How to convert a purchase order (PO) into an invoice

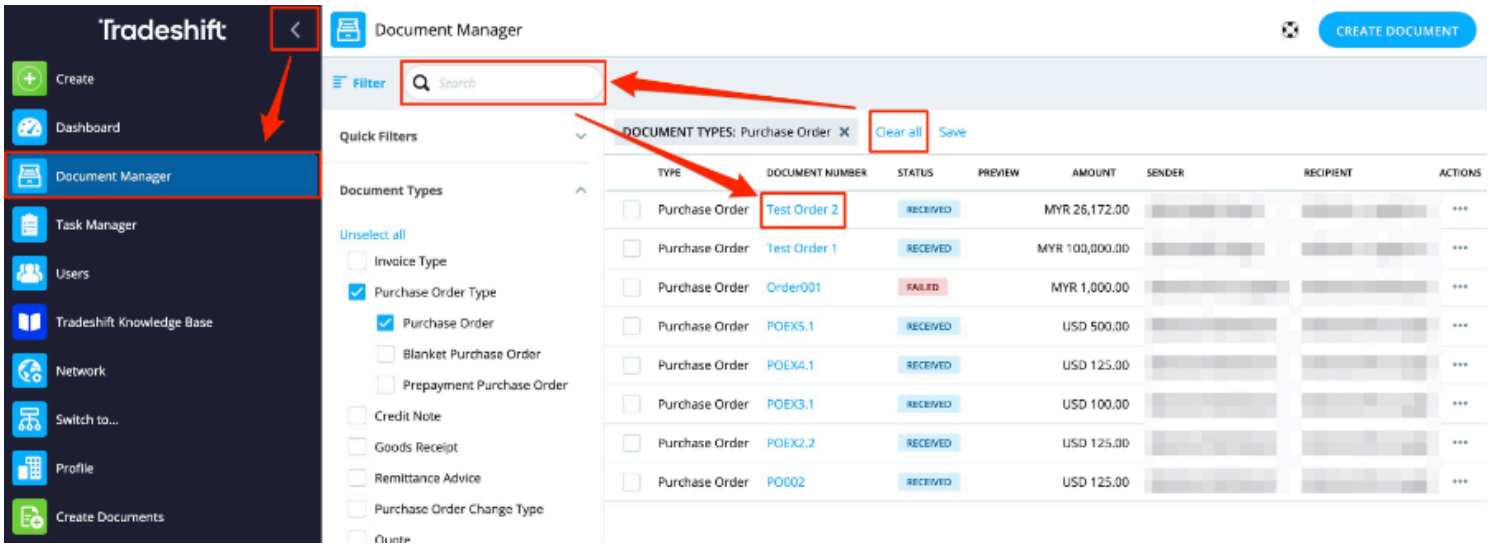
This is step-by-step guide to creating an invoice from a purchase order. A purchase order (PO) conversion (flip) enables you to instantly convert a purchase order into an invoice within Tradeshift. This feature is the fastest, most accurate method for vendors to convert a purchase order into an invoice, as the invoice will be automatically populated with the data from the purchase order.

When creating multiple invoices from the same order, you can use partial order invoicing. This comes in use when the customer sends one large purchase order for the year with monthly services that need to be performed. You can therefore create multiple invoices against that purchase order instead of receiving many small orders.

Note: If you have received an **order change** from your customer, that order change replaces the original purchase order. In this case, you should use the order change for the conversion (flip) and not the purchase order.

Follow the steps below to create a partial or a full purchase order invoice:

- Access the **Document Manager app** via the sidebar. If the Document Manager app is not in the sidebar, click on **All apps** and search for Document Manager.
- Make sure to click on **Clear all** if the option is activated, **search for the purchase order** you wish to invoice against. To easily find purchase orders, filter your view to display purchase orders and order changes, as described here. You can also search for the purchase order number by adding the purchase order ID in the search bar. If the purchase order is not available, reach out to your customer in order to upload it.



Select the purchase order in status **Received**.

Click on the **Create invoice button** at the top of the screen.

The Create page will open, with the purchase order data already populated. Edit the purchase order line data, as needed, and then click **Send**. The invoice will be generated and sent to the customer.

Related Resources:

- Flip a Purchase Order into an Invoice Video Guide
- Searching for a purchase order
- Information included in a purchase order

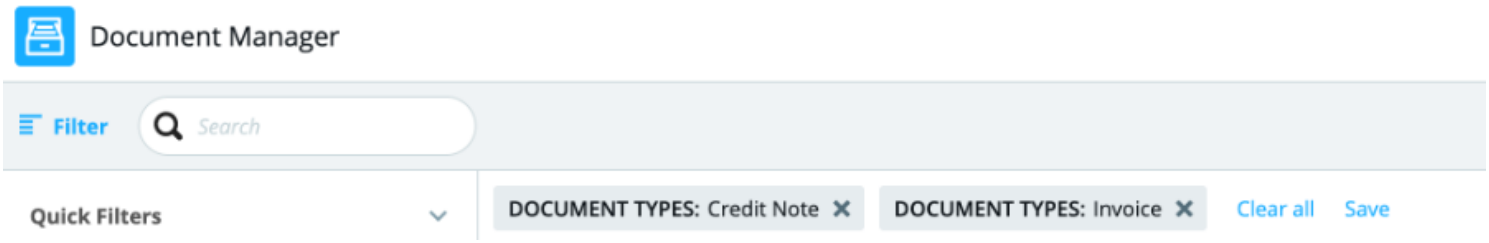
I can't find my Purchase Order in the Document Manager app, what should I do?

In order to find and process a purchase order, you need to access the Document Manager app.

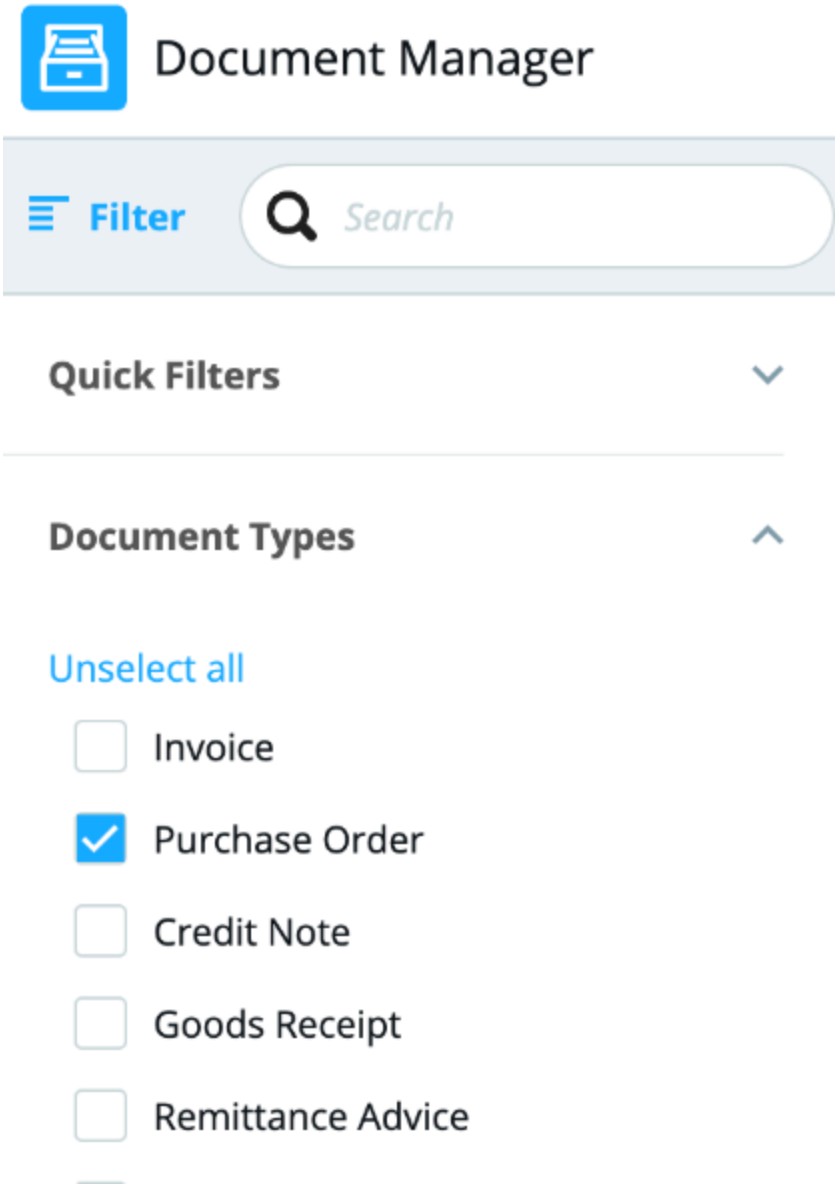
To access the **Document Manager app**, click on the app icon in the left sidebar. If the Document Manager app icon is not available in the sidebar, click on **All apps** and search for Document Manager. To have the app always readily accessible, click on the star icon to add it to your sidebar.

In the Document Manager app, on the left side of the document list, you can find several filters. Use these filters to refine your search and get specific results. The set of available filters allows you

to filter by status, document type issue date and more. The filters you select show up as tags on top of your document list. You can remove tags one by one by clicking on the tag's cross icon. You can also clear all the selected filters at once by clicking **Clear all**.



To search for purchase orders, click on the **Document Types** filter and select **Purchase Orders** from the drop-down list. This will only display purchase orders in the document list, making it easier to search for the desired document.



If you know the document number, you can also use the **Search** bar in the top left corner to search for your document.

To open the document, click on the **Document Number**. This will open the purchase order and allow you to read the information.

If you cannot find the purchase order in question using the above method, please reach out to your customer using their contact information. If you cannot find the customer's contact information, you can access their Landing Page in the **Support Center app**, under **Landing Pages**.

Related Resources:

- Getting started with Document Manager
- How to use filters in Document Manager

Why am I getting the error "the user is not currently accepting invoices"?

If when trying to send an invoice to your customer you receive the message "the user is not currently accepting invoices," this indicates that you are not connected to the customer correctly. Please follow the steps below to amend this:

1. Check the **Network App** to see if it contains a connection with your customer. If the connection is available, this means that it is not set up correctly in the backend, so you will need to contact your customer to request onboarding.

2. If the connection is not available, please reach out to your customer. If you do not have the customer's contact information, you can access their Landing Page in the **Support Center app**, under **Landing Pages** to find their contact details.

Related Resources:

- How to add a connection to your Network
- Connection statuses
- Unverified relationships in the Tradeshift Network
- What are the most common invoice errors?

I have sent an invoice, but realized that I made a mistake. How do I correct this?

An already sent invoice cannot be directly modified due to the VAT certification. Nevertheless, if you made a mistake or wish to change something on an invoice, then you can do so by creating a credit note related to that invoice. Essentially, a credit note will invoice the same amount in negative, but it doesn't void the original invoice.

Related Resources:

- How do I convert an invoice into a credit note?

My invoice is "rejected" and I do not understand the rejection reason available in the "status message" column:

Please contact our AP Helpdesk for clarification: AP Helpdesk support contacts (PDF)

My invoice is in status "accepted" but I expect the payment earlier than the date available in the "status message" column:

Please contact the Coty goods / services requestor for clarification.

How to add your company's tax and legal details

Adding and editing your company's tax and legal details can be done in the Profile app.

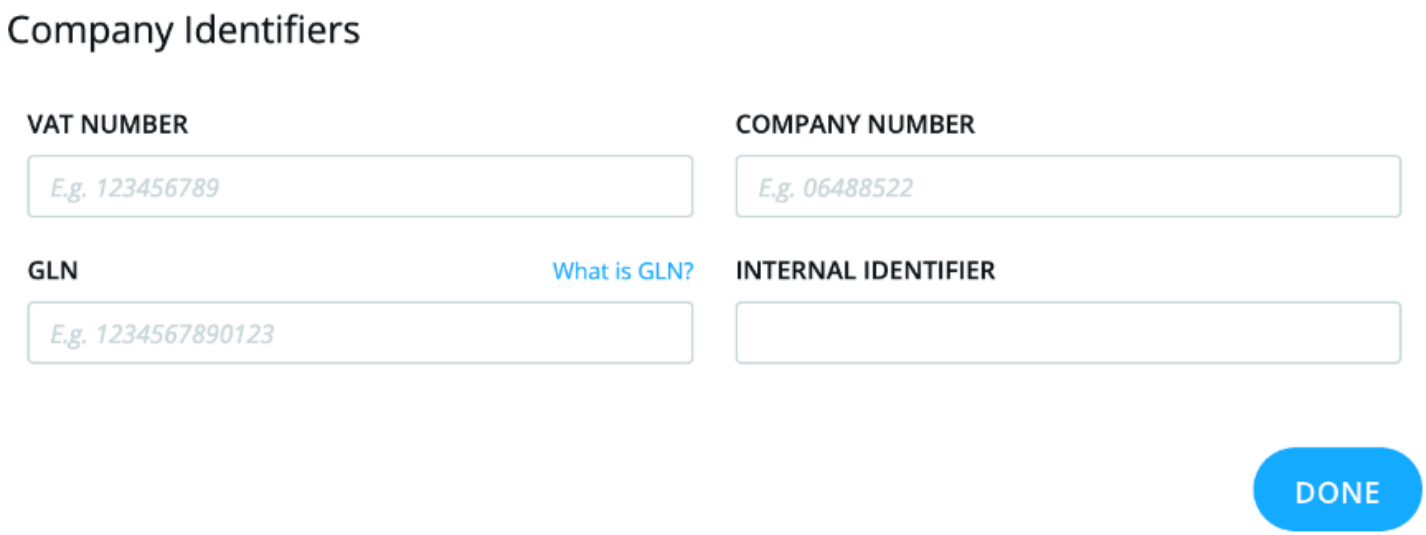
You can read about this app in more detail here.

Open the Profile app and scroll down until you find the **"Company identifiers"** section. To start adding or editing these values, click the blue **"Edit"** button at the top right corner of the section. All

fields can now be edited. When choosing an ID type, Tradeshift will offer some suggestions, but you are welcome to add your own if none are suitable. To do that, click **"Other"** at the end of the list and add your ID.

Once you have selected the ID type, simply enter the ID itself in the field next to it. Note that Tradeshift will notify you of any invalid country-specific IDs you have entered, for example GLNs:

It is very important to complete the necessary Tax and Company Identifiers on your profile before exchanging documents. If you get the frequent error message "Supplier Party fiscal identifier is mandatory" when trying to submit invoices, please make sure that your VAT (Tax ID) is not missing from your profile. If you don't have a VAT number, please contact Tradeshift Support so that we can update your supplier category to enable you to successfully submit your invoices.



Note: When changing your VAT ID, the documents that have already been dispatched will not be affected. Bear in mind that tax authorities and receiver will need to be informed of this change.

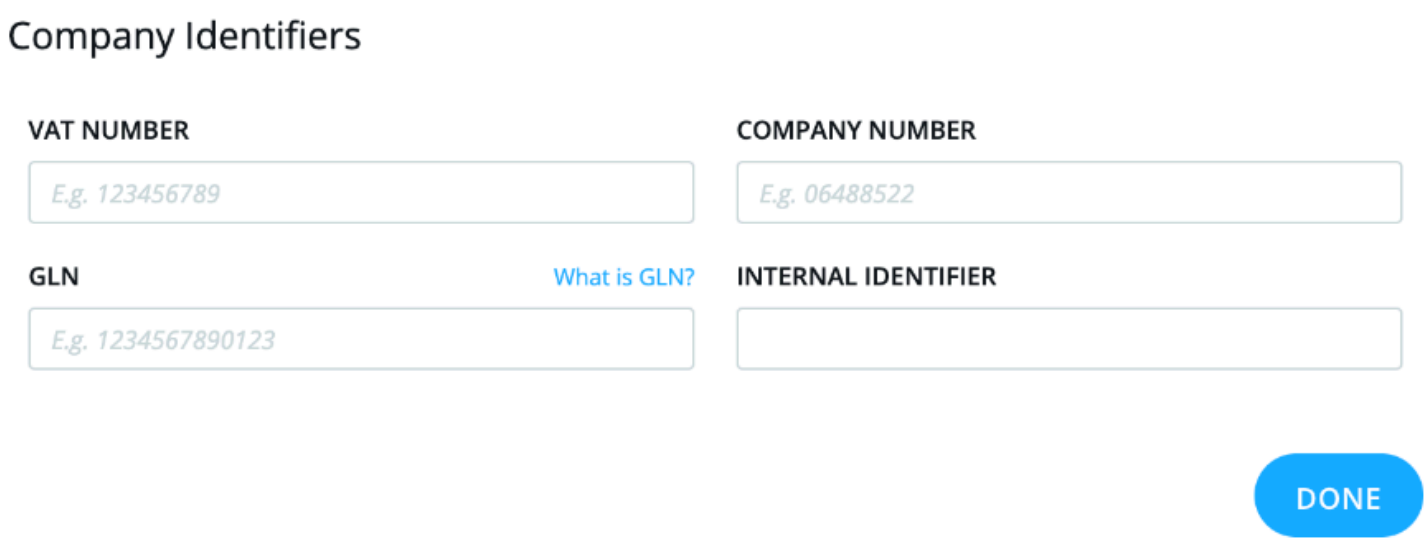
What does this error mean "Fiscal identifier not found"?

This error appears when trying to send or preview a document and the fiscal or tax identifiers are not completed on your company profile.

These identifiers are **mandatory**, so it is necessary to fill in the tax and company identifiers on your profile before exchanging documents.

Please navigate to the **Profile App** and fill in the **Company Identifiers** section.

Note: If you don't have a VAT number, please contact Tradeshift Support so that we can update your supplier category to enable you to successfully submit your invoices.

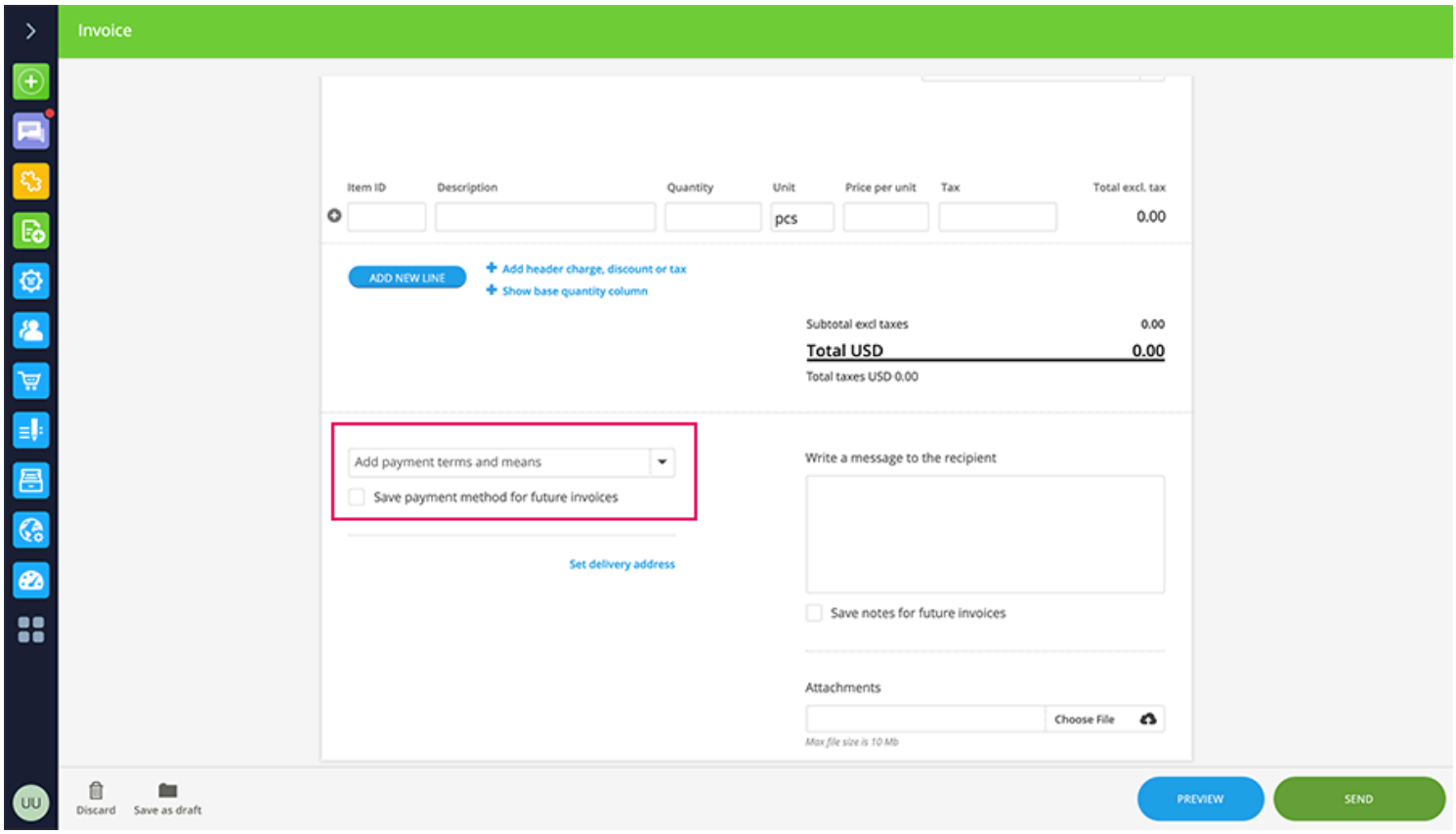


Related Resources:

- What are the most common invoice errors?

How do I add a payment method to my invoice?

When you create an invoice you can add a payment method or several payment methods to it by choosing the desired option from the drop-down menu that is visible in the bottom-left corner of the invoice.



Related Resources:

- How to create an invoice
- What are the most common invoice errors?

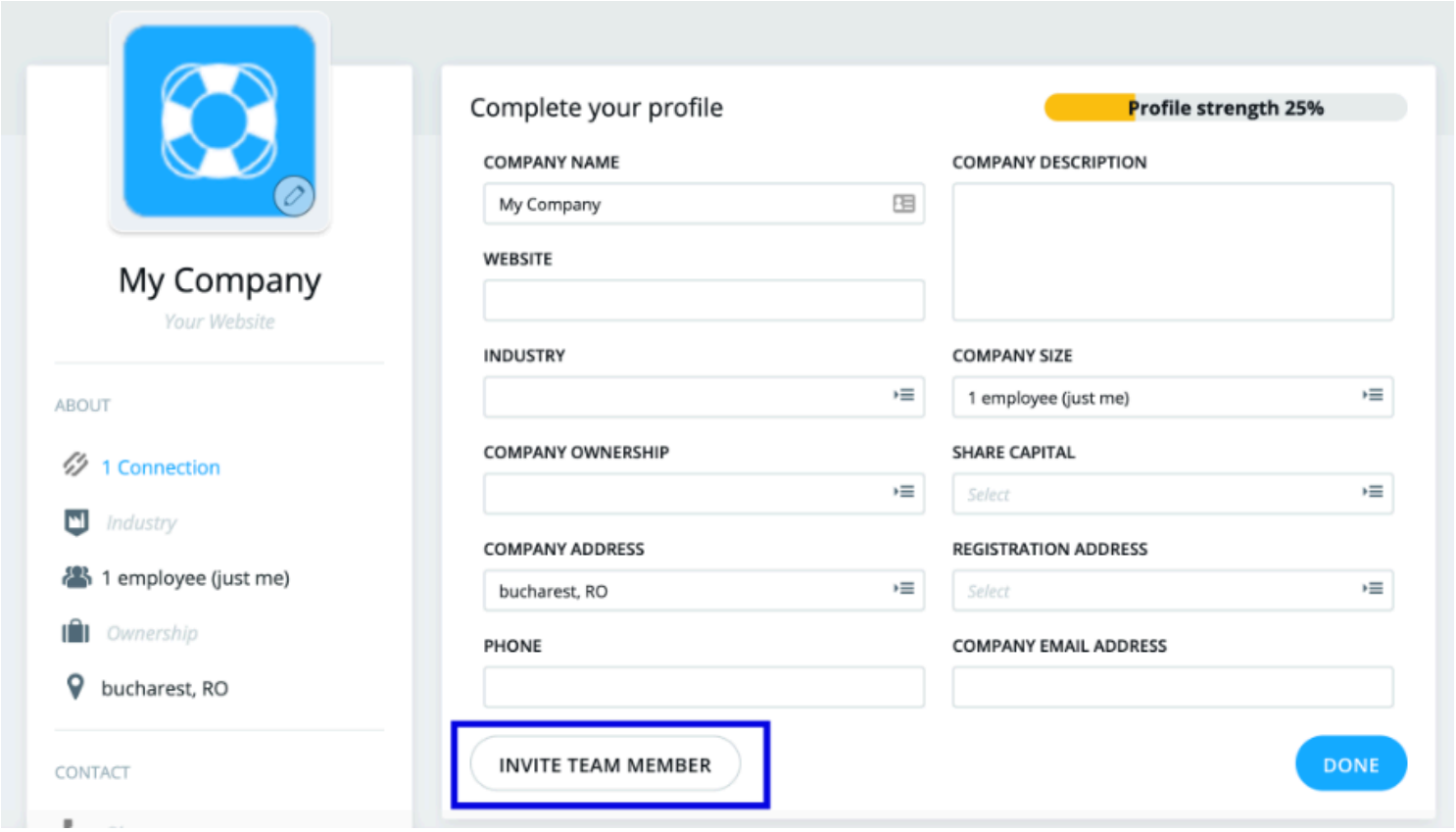
How to add more users to your Tradeshift company account

You can add users to your Tradeshift company account using two different apps:

- Via the Profile app
- Via the Users app

Add users via the Profile app

Once logged in to your account, click the Profile app in the sidebar, which will take you to your company's profile page. Click the **"Invite team member"** button from the **Complete your profile** section to start adding new team members to your company account.

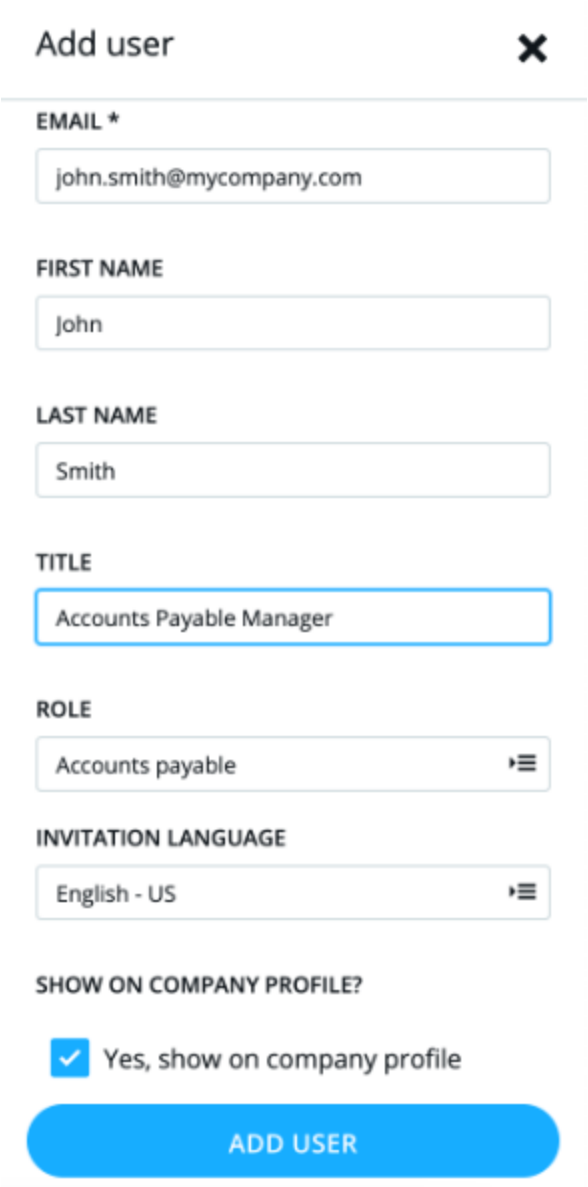


Please complete some details about your company's new user, including their email address (mandatory), name, and title.

Next, you can choose the new user's role. On Tradeshift, each company user can have a specific role according to their real business title, which dictates the actions that they can perform on the platform. For example, all team members (users) can perform invoicing activities and collaborate with business partners. However, only admins can add new team members and can update the company profile. Just choose the appropriate role for your new team member from the drop down menu. Visit this article to learn more about the user roles available on Tradeshift or check the **Related articles** section below.

Finally, you can also choose whether or not this team member is displayed on your company account's profile page.

When you're done adding the details, click **Add user.** The new team member will receive an invitation email from Tradeshift in the language of your choice. All they have to do is click the link, set a password and they will be added to the account.



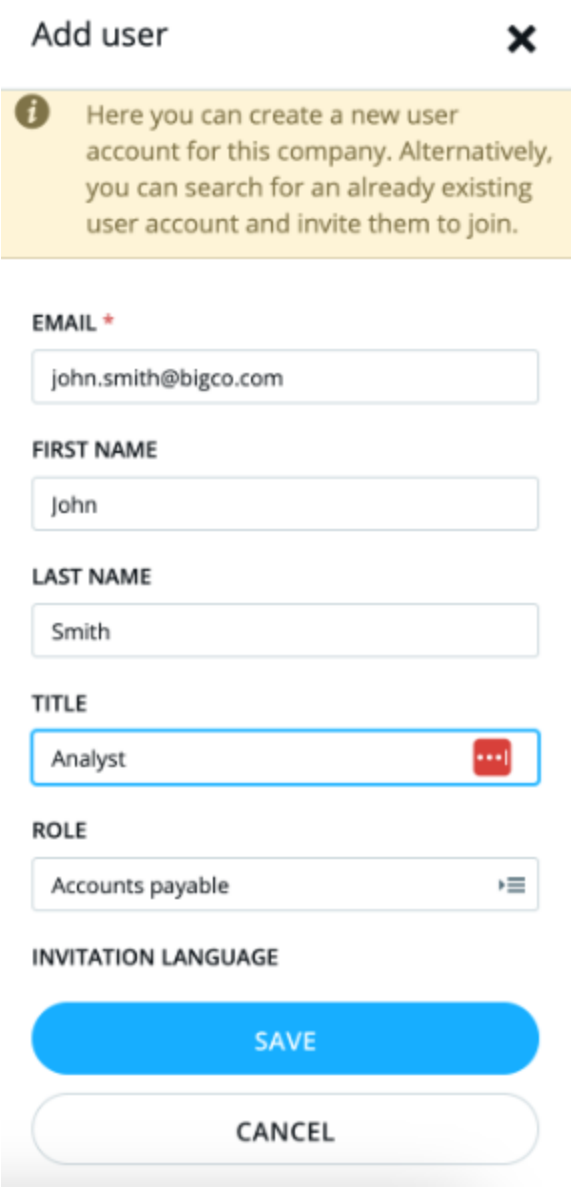
Add users via the Users app

Once logged in to your account, click the Users app. Click the **Add User** button located on the top right of the screen.



Manually add the user information or search for the user you want to invite to your company account. If the user already exists on the Tradeshift platform, you will be able to add that user and invite them to your company (some information about them will be pre-filled, like the name and email address). If the user doesn't exist on the Tradeshift platform, they will receive an invitation to

join the network in their inbox. All they have to do is then click the link, set a password and they will be added to your company.



When you're done adding necessary the details, click **Save** button.

Related articles:

- User roles and permissions
- How to remove a user from your Tradeshift company account
- The Company administrator user roles and their permissions

- How to create and manage users and teams with the Users app

The Account Owner has left the company, what do I do?

If the Account Owner is no longer in the company, please contact **Tradeshift Support** and provide the following information in your support ticket:

- Account Name
- Current email of the Account Owner (also include this email in the CC of the ticket)
- New Account Owner email (also include this email in the CC of the ticket)
- PDF copy of PO as an attachment. If no PO is available, an Invoice copy is needed.

This information is **mandatory** in order for the Tradeshift Support team to go through the necessary verifications.

If another company user has the necessary rights to add the new user in the **Company Admin role**, this will provide the same Admin rights as the Owner of the account.

To learn more about how to add users, visit the below step-by-step guides.

Related Resources:

- How to add more users to your Tradeshift company account
- The Company Administrator user roles and their permissions
- How to invite, create, and manage users and teams with the Users app
- How to remove a user from your Tradeshift company account

Who is the Tradeshift platform for?

The Tradeshift platform is for Partners working with COTY.

Do COTY Partners have to use Tradeshift to send invoices to Coty and what is the deadline to do this?

Yes, because of the benefits Tradeshift offers for COTY Partners, sending invoices via Tradeshift is mandatory and any invoices received via other methods after the 7th of February will be put on hold and our partners will be notified with a request to resubmit the invoice through Tradeshift.

Why did COTY implement Tradeshift?

COTY implemented the "Tradeshift Engage" platform for a better transparency and more efficient ways of working with the Partners. It allows the COTY Partners not only to upload the invoices, but also checking purchase orders and historical/current data related to invoices.

How can COTY Partners use the Tradeshift?

The Tradeshift is designed to show the partners the same basic data, that is visible for the COTY employees, including buyers and finance. COTY Partners, thanks to "Tradeshift Engage" will be able to see the status of their invoices, payment details and a financial summary of cooperation with COTY (historical data etc.).

Frequent Q&A's

Quick links to the most-requested Tradeshift help articles and support resources. Click any link below to open the corresponding knowledge base article.

Topic	Link
Contact the Support Center from Tradeshift	https://support.tradeshift.com/requests/new
How to convert multiple PO's into an invoice	https://coty.support.tradeshift.com/knowledgebase/article/360014492079
How to partially invoice a PO with multiple lines	https://coty.support.tradeshift.com/knowledgebase/article/360017616859
How to invite more users to your company account	https://coty.support.tradeshift.com/knowledgebase/article/5403227252626

Topic	Link
How to transfer the ownership of your company account	https://coty.support.tradeshift.com/knowledgebase/article/5403708000530
How to submit a VMD Questionnaire	https://coty.support.tradeshift.com/knowledgebase/article/5651360202386
Register to bi-weekly Onboarding Webinars	https://tradeshift.com/supplier-onboarding/supplier-onboarding-training/

Who can COTY Partner contact for questions related to Tradeshift?

For technical/navigation queries please contact Tradeshift support at https://support.tradeshift.com/requests/new

Which countries or Coty entities are the scope of Tradeshift?

These are the countries in scope:

AMERICAS:

- United States
- Canada

EUROPE:

- Germany
- France
- Netherlands
- Poland
- Spain

- Switzerland
- United Kingdom

AMEA:

- Arab Emirates
- Australia
- China (only Tradeshift Engage)
- Malaysia
- Singapore