

# MyAccount Supplier Portal – Entering Invoice English

Revision Date: **5 October 2015**

**Purpose:**

To explain the process for entering Invoice through the MyAccount Supplier Portal.

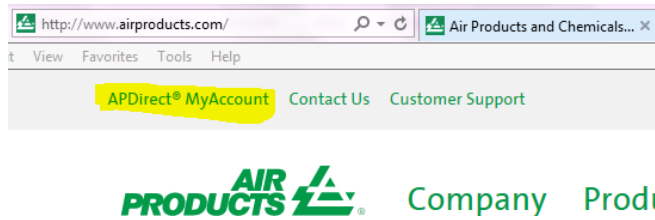
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## Log In

Go to [www.airproducts.com](http://www.airproducts.com)

On top left hand corner select <APDirect MyAccount>



Enter you Username (email address) and Password.

### Already registered

If you have already registered, please login below

\*Username\* / E-mail:  [\\*Click here if this is not you](#)

\*Password\* :  [Forgot your password?](#)

You will be directed to the supplier welcome page and will only see the applications that you have access to on the left toolbar. Click on <Submit Invoice>:

## Welcome

Supplier are integral members of our team. We created this site to give you online access to procurement and payables organizations. You will find information on how to manage supplier-related items and policies.

Through our full range of online services, you'll be able to place orders, download invoices, enroll in e-Payment and much more!

**x - Supplier Information**

x - Information to help you do business with us.  
x - [tell me more](#) →

**x - Automated Clearing House**

x - Get paid electronically!  
x - [Fill out the ACH form](#) →

[Submit Goods Receipt](#)

[View Purchase orders](#)

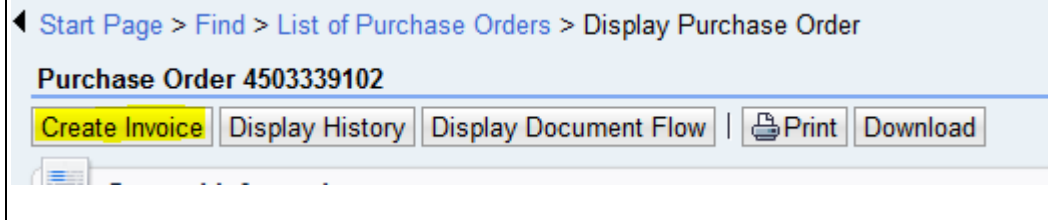
[Submit invoice](#)

# Enter Invoice

## Find the Purchase Order to invoice:

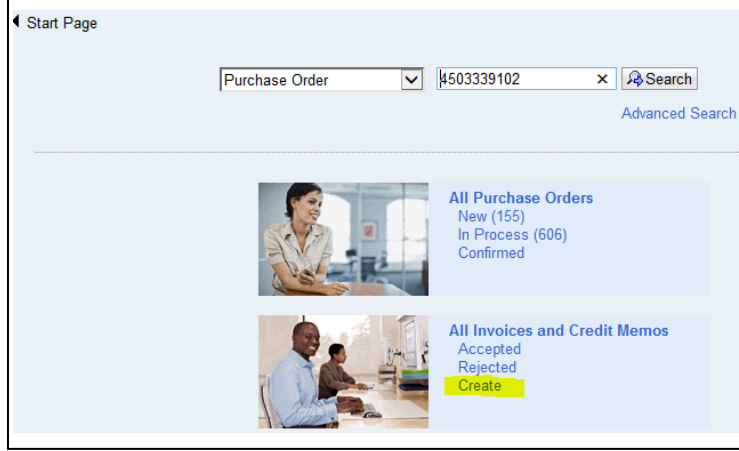
There are several ways to start the invoice process.

You can click the create invoice button when in the Purchase Order. This job aid will tell you how to find a purchase order: **“How to view Purchase Order and Enter Purchase Order Confirmation on Supplier Portal”**.

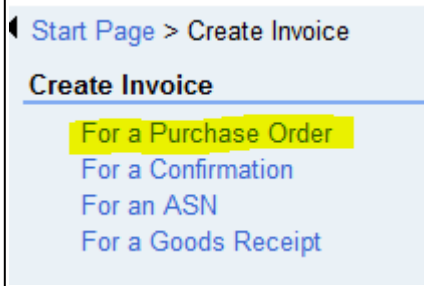


## OR:

You can click on the “Create” option under All Invoices and Credit Memos from the main home page.



Then choose “For a Purchase Order”



You will see a listing of all Purchase Orders with their respective statuses.

◀ Start Page > Create Invoice > List of Purchase Orders

**List of Purchase Orders**

Create Invoice

| Purchase Order No. | Document Date | Total Value | Status     |
|--------------------|---------------|-------------|------------|
| 4503339204         | 09-11-2015    | 755.88      | New        |
| 4503339105         | 09-01-2015    | 2,000.00    | Confirmed  |
| 4503339102         | 09-01-2015    | 755.88      | In Process |
| 4503338801         | 08-11-2015    | 4.00        | Confirmed  |
| 4503338297         | 07-29-2015    | 112.20      | New        |
| 4503336229         | 06-30-2015    | 5,000.00    | Confirmed  |
| 4503332646         | 03-13-2015    | 2,202.45    | Confirmed  |
| 4503333062         | 03-13-2015    | 734.15      | Confirmed  |
| 4503331550         | 02-13-2015    | 4.00        | New        |

Highlight the Purchase Order you want to create an invoice for then click on <Create Invoice>.

**Note:** The Purchase order does not need to have a status of confirmed to submit an invoice.

◀ Start Page > Create Invoice > List of Purchase Orders

**List of Purchase Orders**

Create Invoice

| Purchase Order No. | Document Date | Total Value | Status     |
|--------------------|---------------|-------------|------------|
| 4503339204         | 09-11-2015    | 755.88      | New        |
| 4503339105         | 09-01-2015    | 2,000.00    | Confirmed  |
| 4503339102         | 09-01-2015    | 755.88      | In Process |
| 4503338801         | 08-11-2015    | 4.00        | Confirmed  |
| 4503338297         | 07-29-2015    | 112.20      | New        |
| 4503336229         | 06-30-2015    | 5,000.00    | Confirmed  |
| 4503332646         | 03-13-2015    | 2,202.45    | Confirmed  |
| 4503333062         | 03-13-2015    | 734.15      | Confirmed  |
| 4503331550         | 02-13-2015    | 4.00        | New        |

### Attach supporting documents to the invoice:

Under "Communication and Collaboration", you can attach supporting documents and/or your original invoice to this electronic invoice.

Click on add attachment:

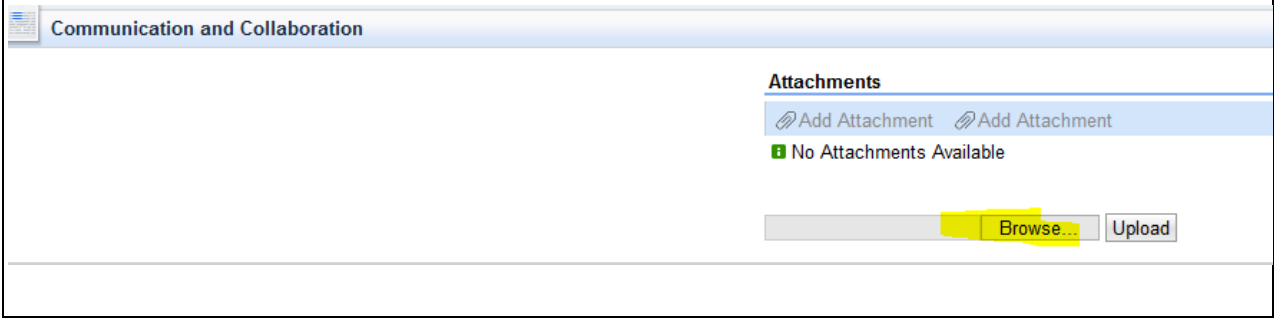
Communication and Collaboration

**Attachments**

Add Attachment Add Attachment

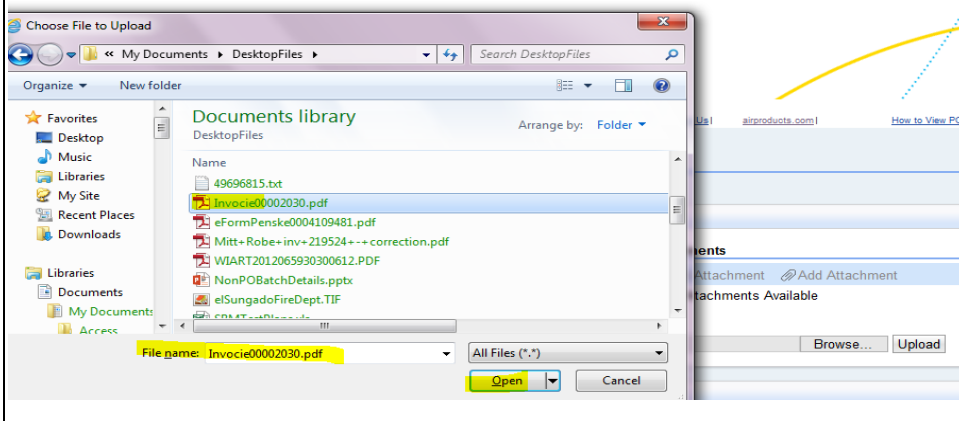
No Attachments Available

Click on Browse. The system will open a Choose File to Upload window.

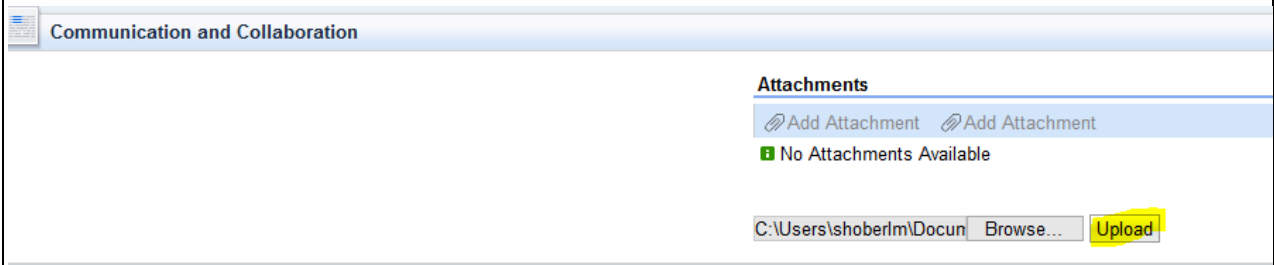


Find the file you want to attach. When you click on that file name, it will populate the file name field in the Choose File to Upload window.

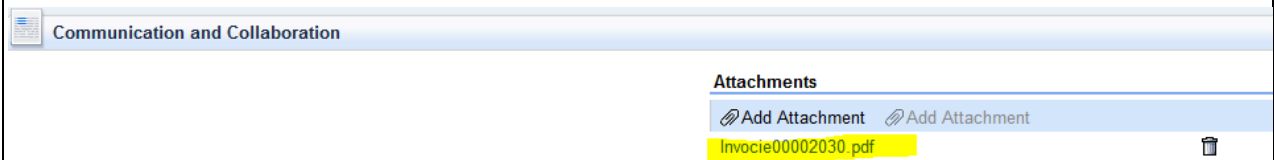
Click on Open and the file returns to the box next to the Browse button.



Click on Upload



The file will be added to this invoice as an attachment as shown below. If this attachment is not correct, you can click on the trash can to remove from this invoice.



Repeat these steps for as many attachments as you have to attach to this invoice.

## Invoice Data Entry:

Under "General Information"

- Number is your invoice number
- Date is your invoice date. This field will default to the current date. Be sure to update to your invoice date as this is the value we use to start the payment clock.
- Unplanned Delivery Costs are **only** for shipping charges that have been approved by the buyer who issued the purchase order

General Information

**Basic Data**

---

Number:

Name:

Date:  📅

External Reference No.:

Status:

Unplanned Delivery Costs:  0.00 USD

Under "Item Overview "

- Change the quantity to the amount you are billing.
  - If you are not billing a particular line item on this invoice, click the trash can on the very right of that line to remove that line from this invoice. Changing the line quantity to zero does NOT work.
  - If the PO line price = \$1.00 and the quantity is a large value, you will enter the value you are billing us in the quantity field – including any decimal values.
- Select the appropriate "Tax" description based on if you will bill us tax (A/P Sales Tax) or not (A/P Tax Exempt)

Item Overview

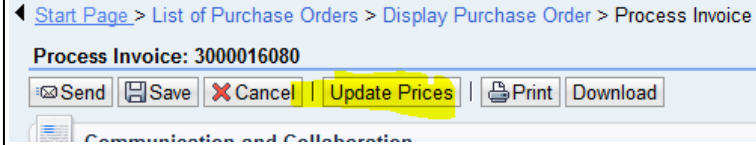
| Number | Description | Product | Quantity | Unit of Mea... | Net Value  |               |            |    |
|--------|-------------|---------|----------|----------------|------------|---------------|------------|----|
| 10     | Test EA     |         | 950.000  | each           | 950.00 USD | A/P Sales Tax | 4503339105 | 10 |
| 20     | Test EA2    |         | 975.000  | each           | 975.00 USD | A/P Sales Tax | 4503339105 | 20 |

A/P Lease Tax  
 A/P Sales Tax  
 A/P Self Assessment Use Tax  
 A/P Tax Exempt  
 Canada A/P Purch Tax (GST no QST)  
 Canada A/P Purch Tax (GST/HST ONLY)

Enter the appropriate tax amount, if applicable, in the tax amount field.

| Condition                | Manual Input |     |
|--------------------------|--------------|-----|
| Net Value                | 1,925.00     | USD |
| Unplanned Delivery Costs | 0.00         | USD |
| Tax Amount               | 0.00         | USD |
| Gross Price              | 1,925.00     | USD |

Once all your invoice information is entered click on <Update Prices > at the top of the screen.



In the item overview section, check to be sure the Gross Price on this invoice is what you expect to get paid. If not, than something is incorrect on your entry. You will either need to fix your entry or if PO prices are not what you are billing, go back to the buyer who issued the PO to correct the PO values so you can bill correctly.

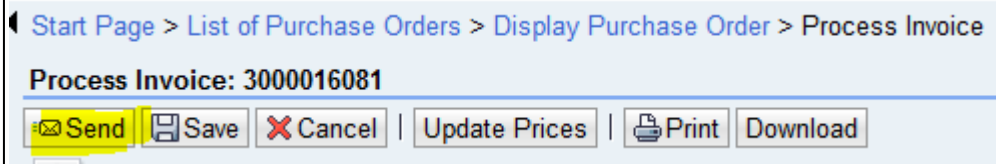
**NOTE** : We will pay you the value in the Gross Price field NOT what is on your hard copy attached invoice.

| Condition                | Manual Input |     |
|--------------------------|--------------|-----|
| Net Value                | 50.00        | USD |
| Unplanned Delivery Costs | 5.00         | USD |
| Tax Amount               | 3.25         | USD |
| Gross Price              | 58.25        | USD |

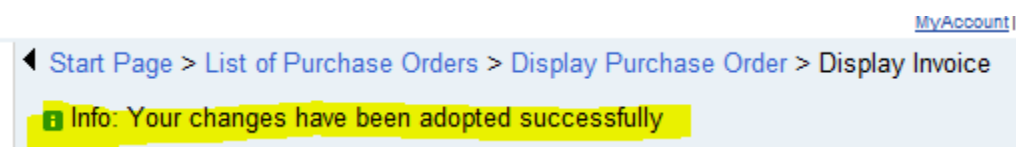
Once you have confirmed all the information is correct, click on <Send >. Your Invoice will be sent to Air Products and will post and pay based on the payment terms referenced on the PO.

Other buttons on this screen:

- **Save** button will allow you to save this entry and complete at a later time. The invoice status of saved items will be in progress. **NOTE**: In Progress invoices have not been submitted to Air Products for payment.
- **Cancel** button will allow this item to be removed from the system
- **Print** button will allow you to print a PDF copy of the invoice.



You will receive the following message upon successful send:



# Enter Credit memo

## Find the Invoice to credit:

You need to start the credit memo process from the original invoice which you need to credit. To find that original invoice you can either:

From the Start Page click on "All Invoices and Credit Memos"

Start Page

Purchase Order [v] 4503339105 [x] Search [magnifying glass icon]

Advanced Search

All Purchase Orders  
New (155)  
In Process (606)  
Confirmed

All Invoices and Credit Memos  
Accepted  
Rejected  
Create

You will see a listing of all your Invoices that have been sent.

Click on the invoice number that you want to issue a credit for.

Start Page > List of Invoices

List of Invoices and Credit Memos

Print Download

| Type    | Number  | Name       | Gross Price | Status        |
|---------|---------|------------|-------------|---------------|
| Invoice | TESTHH1 | PO         | 4,187.48USD | Document Sent |
| Invoice | HHTEST2 | PO         | 4,192.48USD | Document Sent |
| Invoice | HHTEST1 | PO         | 4,192.48USD | Document Sent |
| Invoice | 1554247 | HH30025354 | 8,999.25USD | Document Sent |
| Invoice | 1553570 | HH30025347 | 6,318.75USD | Document Sent |
| Invoice | 1553945 | HH30025352 | 1,644.98USD | Document Sent |
| Invoice | 1553948 | HH30025355 | 3,925.74USD | Document Sent |
| Invoice | 1553947 | HH30025359 | 1,644.98USD | Document Sent |
| Invoice | 1553571 | HH30025351 | 6,318.75USD | Document Sent |
| Invoice | 1552410 | HH30025334 | 3,869.33USD | Document Sent |
| Invoice | 1552352 | HH30025329 | 3,869.33USD | Document Sent |
| Invoice | 1550539 | HH30025305 | 1,250.00USD | Document Sent |
| Invoice | 1552353 | HH30025331 | 3,869.33USD | Document Sent |
| Invoice | 1551720 | HH30025328 | 750.00USD   | Document Sent |
| Invoice | 1552157 | HH30025316 | 4,941.90USD | Document Sent |

Page 1 Back 1 2 3 4 5 Forward 15



**OR**

- From the Start Page choose Invoice or Credit Memo from the search list
- Enter the invoice number you want to issue a credit for
- Click Search

[MYACCOUNT |](#) [CONTACT US |](#) [airproducts](#)

◀ Start Page

Invoice or Credit Memo ▼ HHTEST1 × Search

[Advanced Search](#)

You will see that invoice appear in the list.

Click on the invoice number to open the invoice screen.

◀ Start Page > List of Invoices

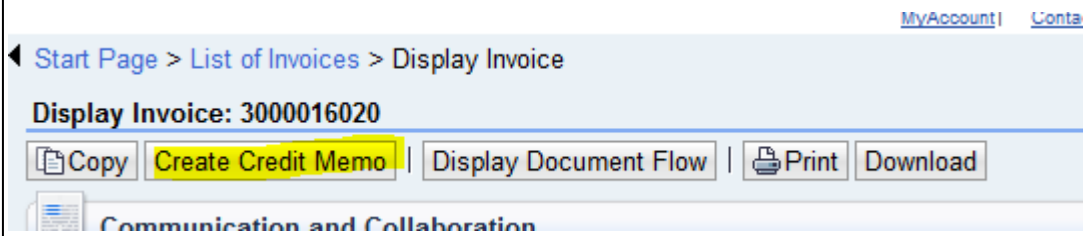
**List of Invoices and Credit Memos**

[Print](#) [Download](#)

| Type    | Number                  | Name | Gross Price  | Status        |
|---------|-------------------------|------|--------------|---------------|
| Invoice | <a href="#">HHTEST1</a> | PO   | 4,192.48 USD | Document Sent |

## Credit Memo Data Entry:

Once in the invoice you need to credit, Click on <Create Credit memo>



MyAccount | Conta

◀ Start Page > List of Invoices > Display Invoice

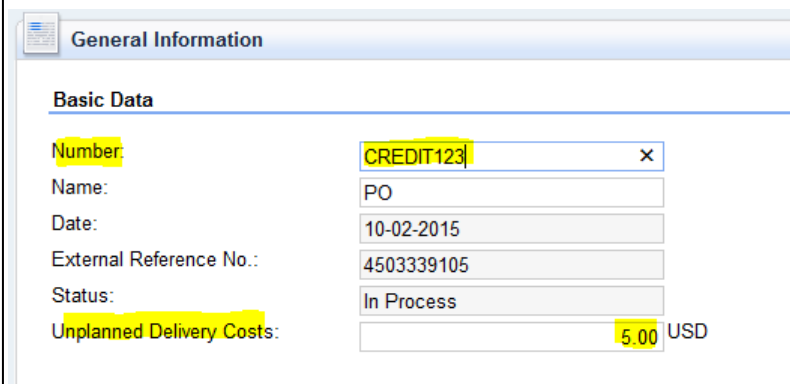
**Display Invoice: 3000016020**

Copy Create Credit Memo Display Document Flow | Print Download

Communication and Collaboration

Input the Credit Memo number and any credited delivery costs, if applicable.

Note: The system will default to the original invoice value so if you are not crediting the invoice in full, you will need to remove information.



General Information

**Basic Data**

Number: CREDIT123 x

Name: PO

Date: 10-02-2015

External Reference No.: 4503339105

Status: In Process

Unplanned Delivery Costs: 5.00 USD

You can also attach any supporting document just as you did when you created the invoice:

### Attachments

Add Attachment Add Attachment

No Attachments Available

Under "Item Overview"

- Change the quantity to the amount you are crediting.
  - If you are not crediting a particular line item, click the trash can on the very right of that line to remove that line from this credit. Changing the line quantity to zero does NOT work.
- Select the appropriate "Tax" description based on if you will bill us tax (A/P Sales Tax) or not (A/P Tax Exempt)

| Item Overview |             |         |          |                |           |               |                |             |  |
|---------------|-------------|---------|----------|----------------|-----------|---------------|----------------|-------------|--|
| Update Prices |             |         |          |                |           |               |                |             |  |
| Number        | Description | Product | Quantity | Unit of Mea... | Net Value | Tax           | External Re... | Purchase... |  |
| 10            | Test EA     |         | 25.000   | each           | 25.00 USD | A/P Sales T:▼ | 4503339105     | 10          |  |
| 20            | Test EA2    |         | 75.000   | each           | 75.00 USD | A/P Sales T:▼ | 4503339105     | 20          |  |

Enter the appropriate tax amount, if applicable, in the tax amount field.

|                          |        |       |
|--------------------------|--------|-------|
| Net Value                | 100.00 | USD   |
| Unplanned Delivery Costs | 5.00   | USD   |
| Tax Amount               | 5.00   | x USD |
| Gross Price              | 105.00 | USD   |

Once all your credit information is entered click on <Update Prices > at the top of the screen or at the top of the item overview section.

◀ Start Page > List of Purchase Orders > Display Purchase Order > Display Document Flow > Display Invoice > Edit Credit Memo

**Edit Credit Memo: 3000016084**

Send Save Cancel | Update Prices | Print Download

In the item overview section, check to be sure the Gross Price on this credit memo is what you expect to get credit for. If not, than something is incorrect on your entry.

**NOTE** : We will credit the value in the Gross Price field NOT what is on your hard copy attached credit memo.

|                          |       |     |
|--------------------------|-------|-----|
| Net Value                | 25.00 | USD |
| Unplanned Delivery Costs | 0.00  | USD |
| Tax Amount               | 3.25  | USD |
| Gross Price              | 28.25 | USD |

Once you have confirmed all the information is correct, click on <Send >. Your Credit Memo will be sent to Air Products and will post and take a credit on the next payment issued.

Other buttons on this screen:

- **Save** button will allow you to save this entry and complete at a later time. The status of saved items will be in progress. **NOTE:** In Progress credit memos have not been submitted to Air Products.
- **Cancel** button will allow this item to be removed from the system
- **Print** button will allow you to print a PDF copy of the credit memo.

◀ [Start Page](#) > [List of Purchase Orders](#) > [Display Purchase Order](#) > [Display Document Flow](#) > [Display Invoice](#) > [Edit Credit Memo](#)

**Edit Credit Memo: 3000016084**

[Send](#) [Save](#) [Cancel](#) | [Update Prices](#) | [Print](#) [Download](#)

You will receive the following message upon successful send:

[MyAccount](#) | [Contact Us](#) | [airproducts.com](#) | [How to view Purchase Order](#)

◀ [Start Page](#) > [List of Purchase Orders](#) > [Display Purchase Order](#) > [Display Document Flow](#) > [Display Invoice](#) > [Display Credit Memo](#)

**Info:** Your changes have been adopted successfully

# View Invoices and Credit Memos

From the Start Page click on "All Invoices and Credit Memos"

You will see a listing of all your Invoices and Credit Memos and their status.

**In Process** – reflects any invoices or credits that were started and saved but NOT submitted.

**Document Sent** – reflects invoices or credit memos successfully sent to Air Products

Start Page > List of Invoices

List of Invoices and Credit Memos

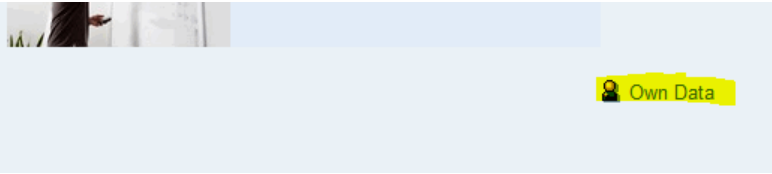
Print Download

| Type    | Number  | Name       | Gross Price | Status        |
|---------|---------|------------|-------------|---------------|
| Invoice | TESTHH1 | PO         | 4,187.48USD | Document Sent |
| Invoice | HHTEST2 | PO         | 4,192.48USD | Document Sent |
| Invoice | HHTEST1 | PO         | 4,192.48USD | Document Sent |
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| Invoice | 1552353 | HH30025331 | 3,869.33USD | Document Sent |
| Invoice | 1551720 | HH30025328 | 750.00USD   | Document Sent |
| Invoice | 1552157 | HH30025316 | 4,941.90USD | Document Sent |

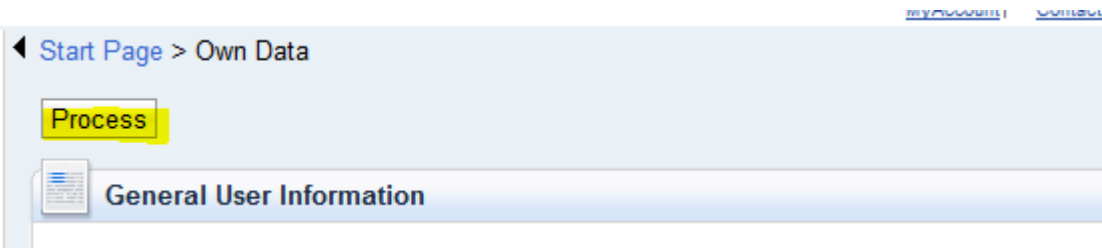
Page 1 Back 1 2 3 4 5 Forward 15

## Change Date and Currency Defaults

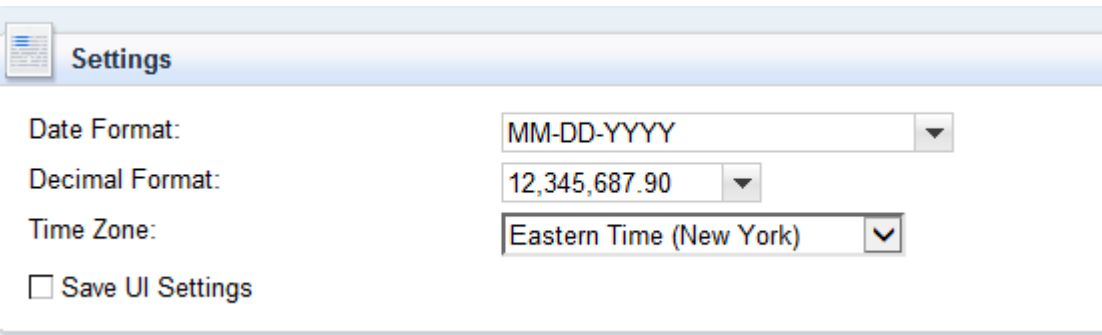
Are you finding that dates and currency are in a European format and not a US format? You can change certain setting in your account using the Own Data pick which is found on the bottom right of the start page.



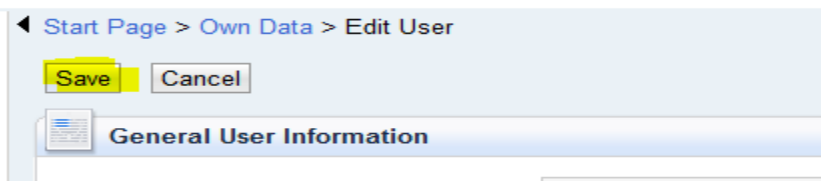
In order to update information on this page you will need to click the process button.



Under settings, you can change default values for Date format and Decimal format.



Save will change your settings. You will need to log out / log back in for the changes to take effect.



**-End of Supplier Portal Job Aide-**