Pagero Invoice Portal 2.0

Create and send invoices

Guide Pagero Invoice Portal 2.0

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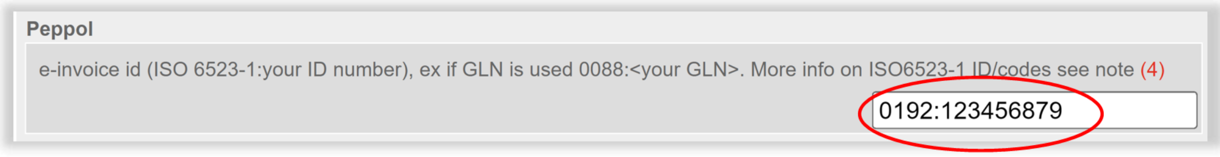
This must be done before the first invoice can be sent

1. As you will be sending via Peppol, you must have complete address information. Go to Settings -> Company Information

The fields that must be filled in are:
• Company name
• Street address
• Postal code
• Village
• Email
• Organization number
• VAT can be included but must not be included (eg: 123456789VAT)

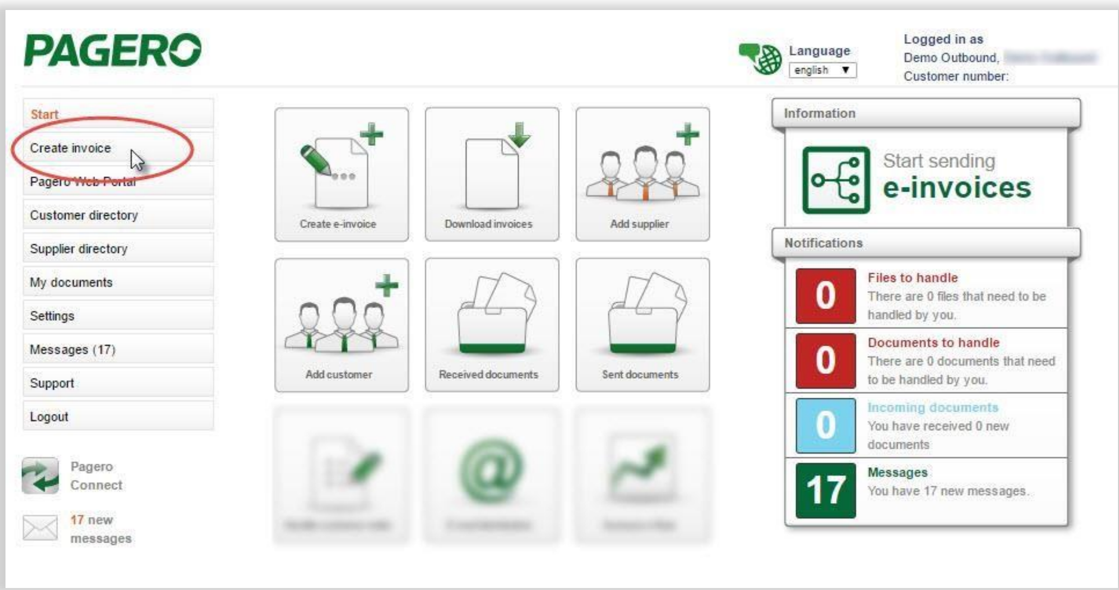
To invoice customers, make sure to update the Peppol e-invoice ID before invoicing.

2. Update the settings through Settings > Company information > Service Provider Settings > Peppol e-ID. Fill in your eID for Peppol, i.e. the one that will identify you as a sender in the Peppol network.
This ID begins with 0192: and your organization number, e.g.: 0192:123456879

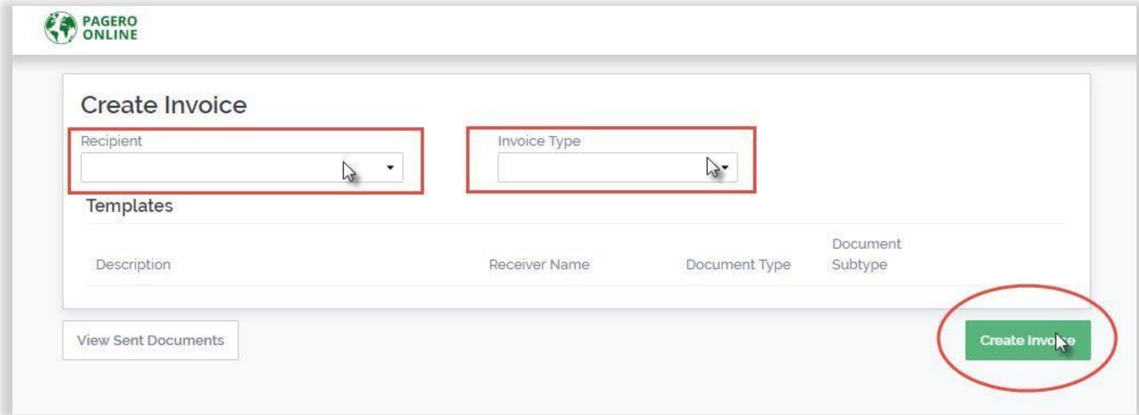


3. Log in to your Pagero Online account.

4. Click **Create invoice**

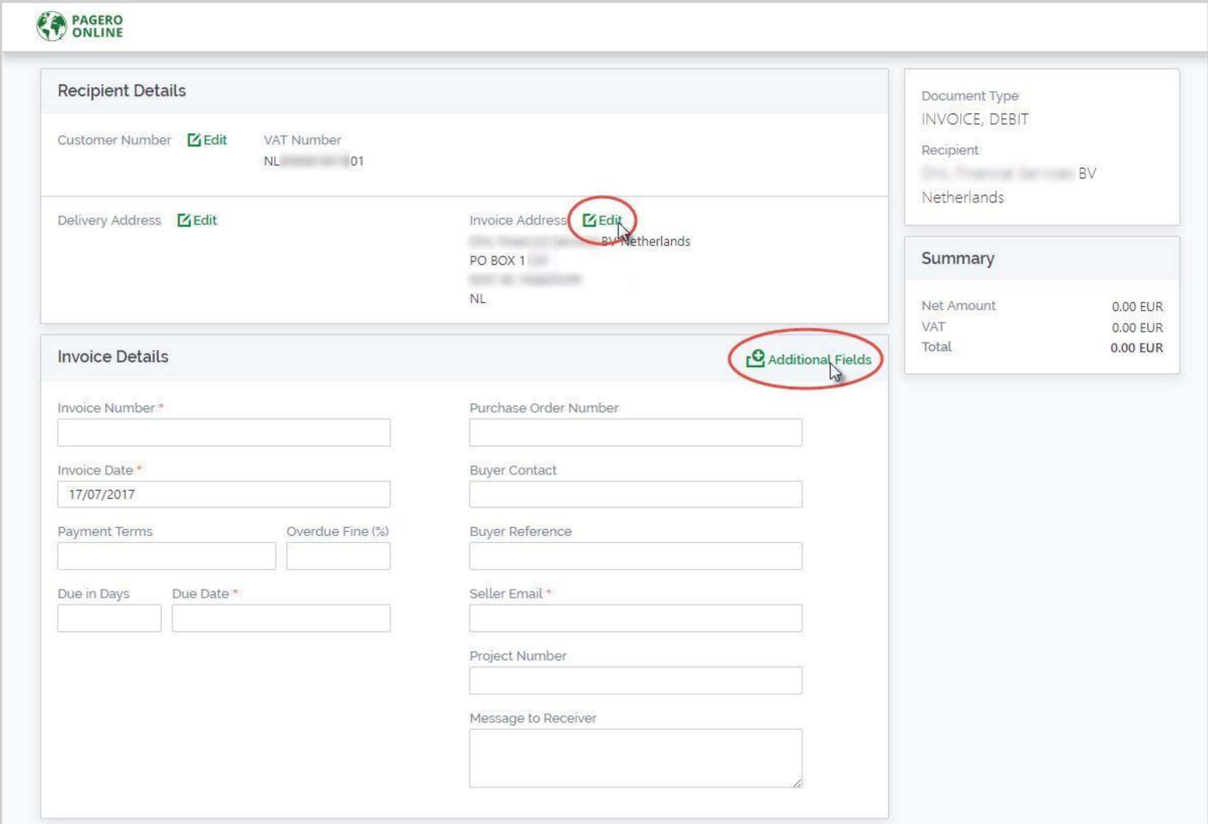


5. Choose the recipient you wish to send a document to, and the type of invoice you wish to create (debit or credit). If you can't find the recipient in the drop-down menu, you need to add them in your customer directory in Pagero Online. Information on how to add customers can be **found in the end of this guide**.

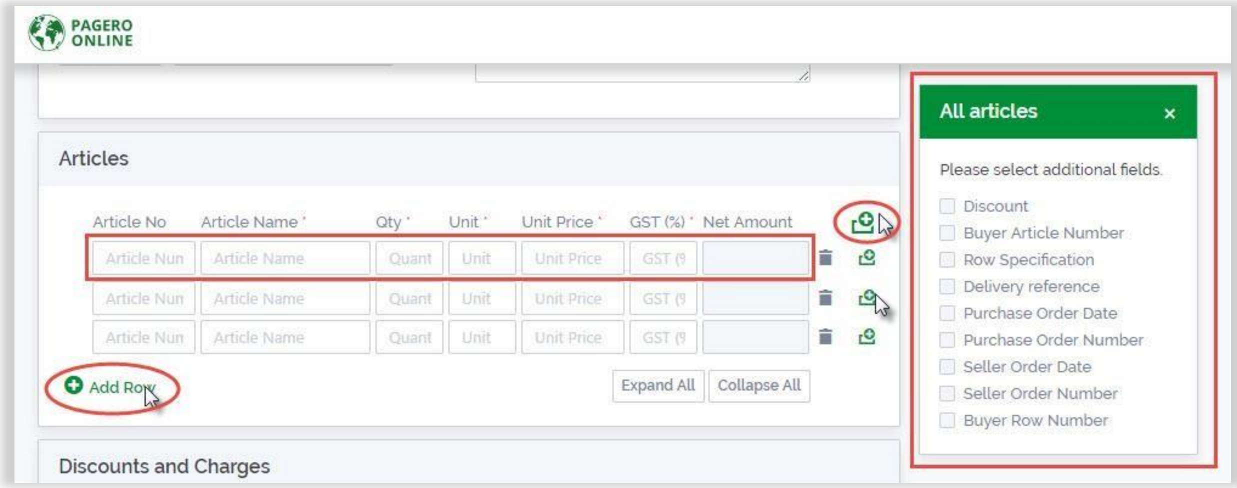


6. The invoice form will show below.
    a. Information about the recipient will be pre-populated. If needed, this information can be edited, by click **Edit**.

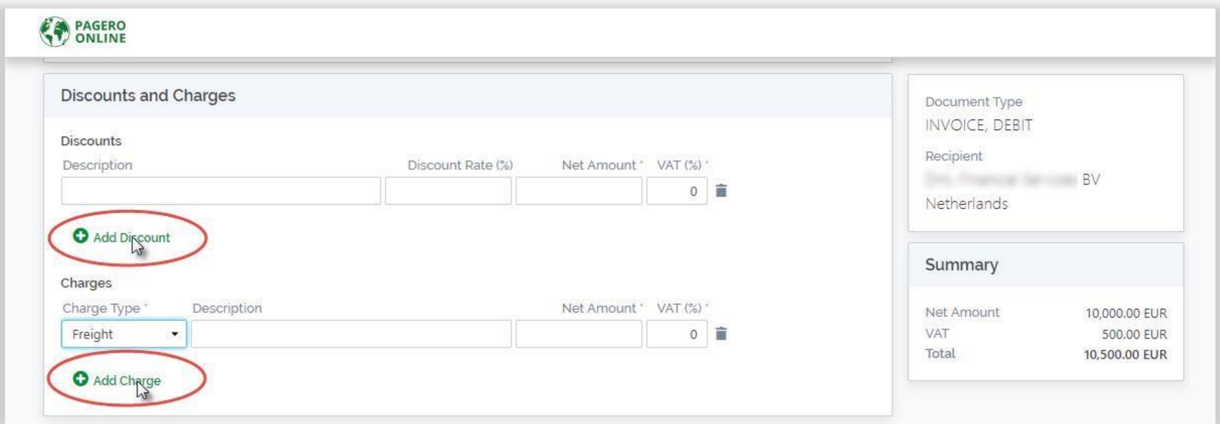
7. Fill in the invoice details. If needed, additional fields can be added, by click **Additional fields**. All mandatory fields, marked with a star, need to be filled in, if not, you will not be able to process/send the invoice.



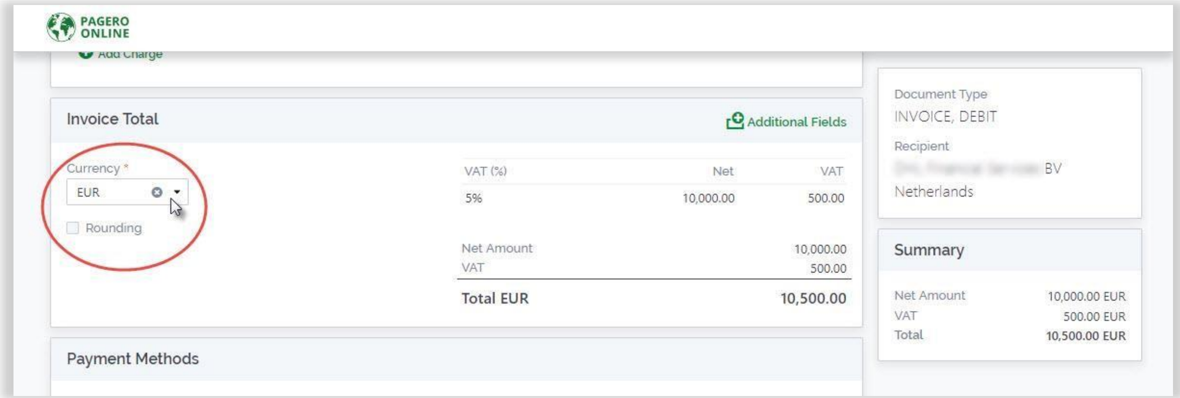
8. Articles – Add information about the articles of the invoice.
    a. Add more rows by click **Add Row**.
    b. If needed you can add additional fields to all rows, by click the plus symbol on the top right. If you wish to add a field to only one specific row, click the plus sign on that row. Choose the additional fields you wish to add in the list on the right side.
    c. To see all added additional fields, click **Expand all**, and **Collapse all** to hide the fields (the additional fields will still be added to the invoice).



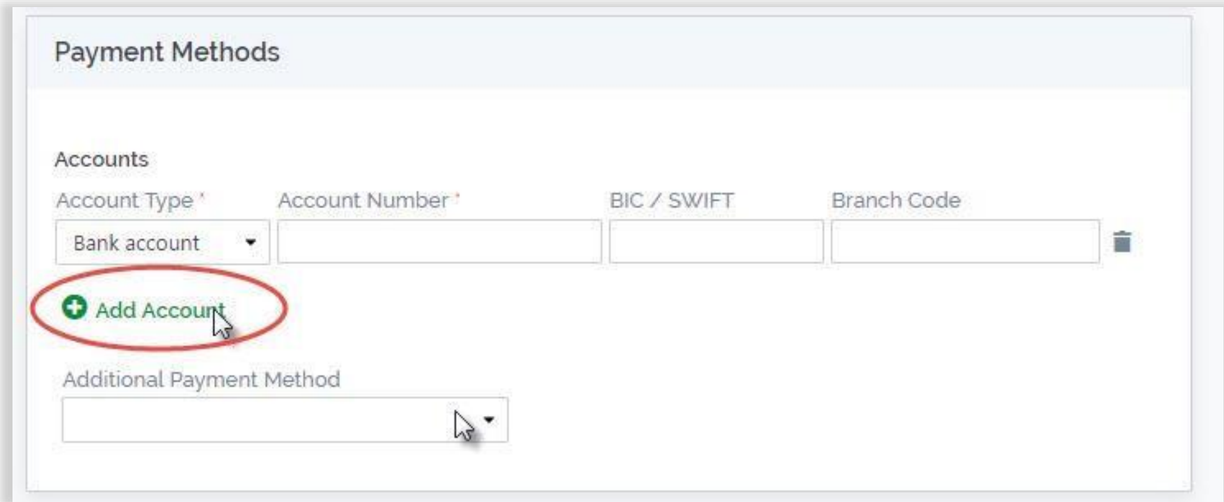
9. If applicable, add discounts or charges, by click **Add Discount** or **Add Charge** and fill in the needed information.



10. If needed, change the currency, and choose if you wish to use rounding.

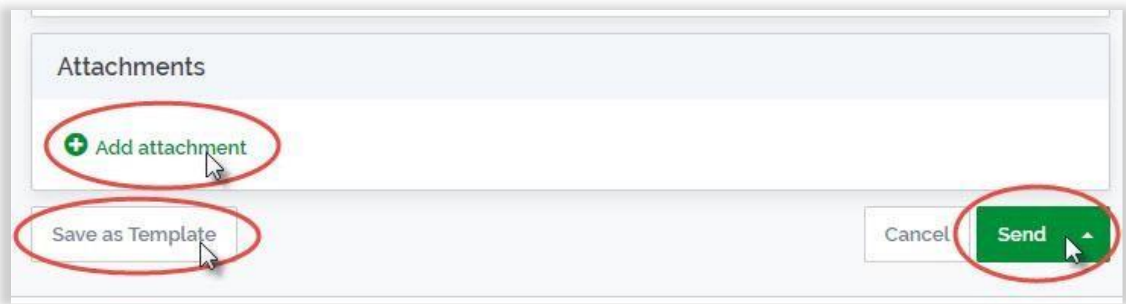


11. Add payment method, to change payment method click the drop-down list.
    a. You can add several payment methods, by click **Add Account** and choose the account type you wish to add in the drop-down list.



12. You need to add the original invoice as a PDF. To do so click **add attachment**, and add your original invoice. If you wish to add other attachments, click **add attachment** and add the attachment.

13. Once the invoice is complete you can proceed and send the invoice, by click Send in the lower right corner.
    a. You can also choose to save your invoice as a Template, the template can be used the next time you wish to send an invoice to this recipient. All information saved in the template will be added to the invoice the next time you choose that template. Templates are chosen in the first step, when you choose recipient. All saved templates will be presented.



How to add a new customer to your customer directory

To be able to send electronic invoices to a recipient you must add the recipients in your customer directory. Without this connection, you will not be able to send any electronic invoices. To add a new customer, log in to Pagero Online, and follow the steps below.

1. Go to the tab **Customer directory, Search & Add Customers**
    a. Search for the customer you wish to add.
    b. You can search either by company name or a company identification number (i.e. VAT-number, organization number, IBAN).
    c. When you find the correct recipient, click on **Add.**
    d. Follow the steps to add the customer. These steps can vary depending on the customer you wish to add. Follow the instructions in each step.
        i. In some cases, you will need to wait for approval by the recipient. Once you are approved you will be able to send electronic invoices to this recipient via the Pagero Invoice Portal.

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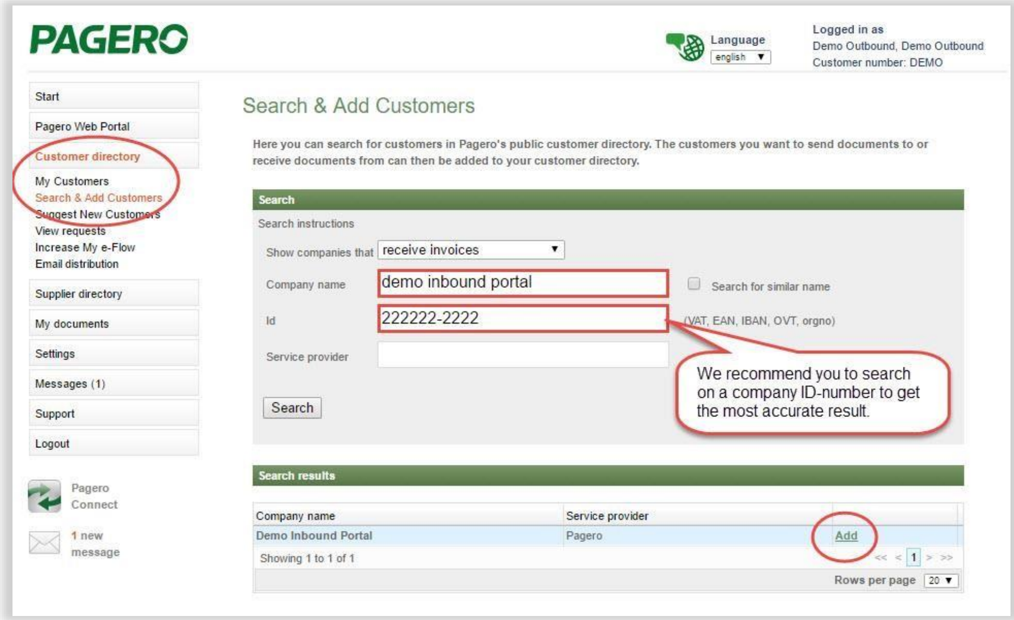

Support

Do you have any questions?

Contact Pagero Service & Support Center https://pageroab.zendesk.com/hc/en-us/requests/new

You can also find contact information to our Support team in Pagero Online, under the tab Support, Contact. Or via https://support.pagero.com/contact-us/