

Pagero Invoice Portal 2.0

Create and send invoices



Guide Pagero Invoice Portal 2.0

Create and send invoices

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.

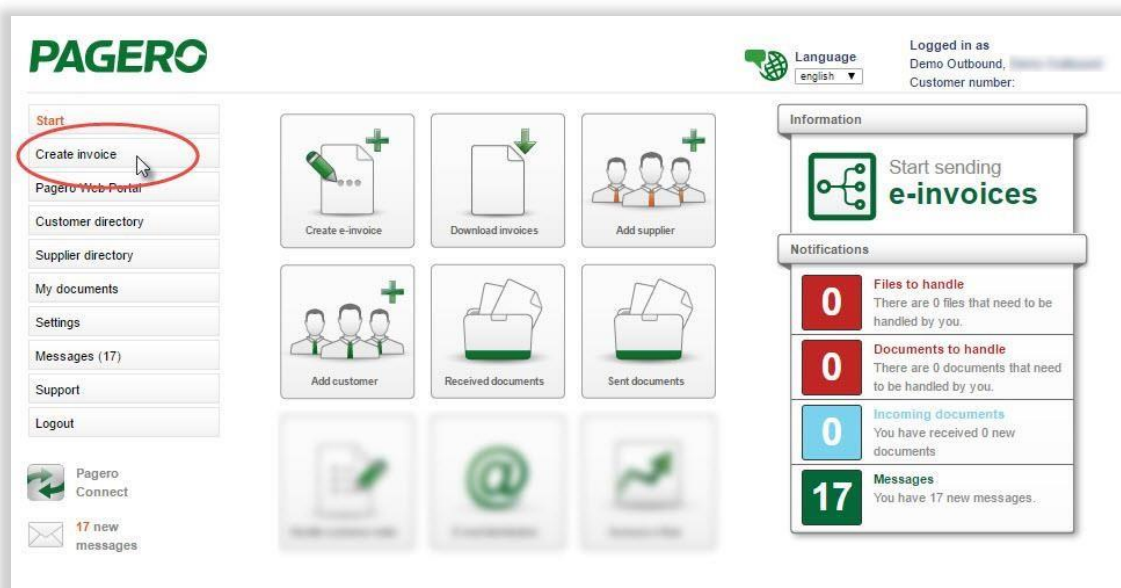
This ID begins with 0192: and your organization number, e.g.: 0192:123456879

Peppol

e-invoice id (ISO 6523-1:your ID number), ex if GLN is used 0088:<your GLN>. More info on ISO6523-1 ID/codes see note (4)

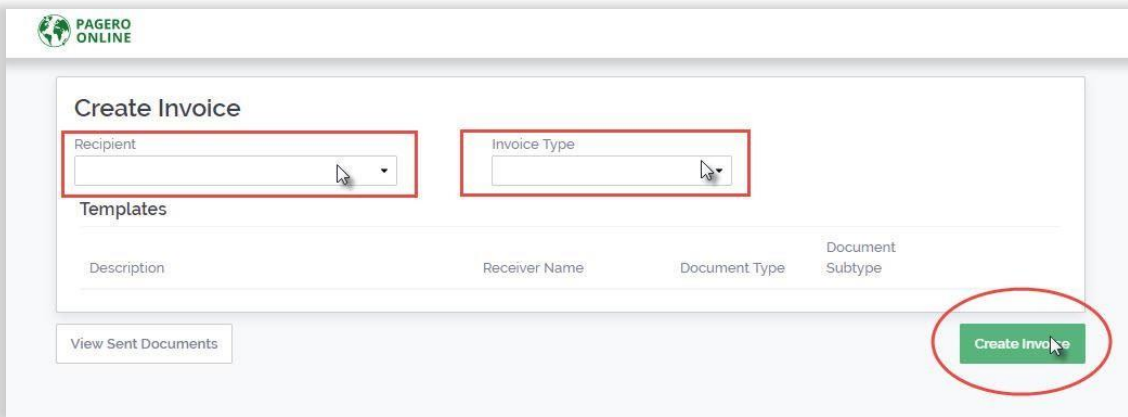
0192:123456879

3. Log in to your Pagero Online account.
4. Click **Create invoice**



The screenshot shows the Pagero Online dashboard. The 'Start' menu on the left has 'Create invoice' circled in red. The main area contains a grid of icons for 'Create e-invoice', 'Download invoices', 'Add supplier', 'Add customer', 'Received documents', and 'Sent documents'. On the right, the 'Information' section says 'Start sending e-invoices'. The 'Notifications' section shows: 0 Files to handle, 0 Documents to handle, 0 Incoming documents, and 17 Messages.

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**.



Create Invoice

Recipient

Invoice Type

Templates

Description	Receiver Name	Document Type	Document Subtype

[View Sent Documents](#)

[Create Invoice](#)

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.

Recipient Details

Customer Number [Edit](#)
VAT Number
NL 01

Delivery Address [Edit](#)
Invoice Address [Edit](#)
PO BOX 1
NL

Document Type
INVOICE, DEBIT
Recipient
BV Netherlands

Summary

Net Amount	0.00 EUR
VAT	0.00 EUR
Total	0.00 EUR

Invoice Details

Invoice Number *

Invoice Date *

Payment Terms

Overdue Fine (%)

Due in Days

Due Date *

Purchase Order Number

Buyer Contact

Buyer Reference

Seller Email *

Project Number

Message to Receiver

[Additional Fields](#)

8. Articles – Add information about the articles of the invoice.

- Add more rows by click **Add Row**.
- 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.
- 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).

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

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

Invoice Total Additional Fields

Currency *
EUR

☐ Rounding

VAT (%)	Net	VAT
5%	10,000.00	500.00
Net Amount		10,000.00
VAT		500.00
Total EUR		10,500.00

Payment Methods

Document Type
INVOICE, DEBIT

Recipient
[Name] BV
Netherlands

Summary

Net Amount	10,000.00 EUR
VAT	500.00 EUR
Total	10,500.00 EUR

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.

Payment Methods

Accounts

Account Type *
Bank account

Account Number *
[Input Field]

BIC / SWIFT
[Input Field]

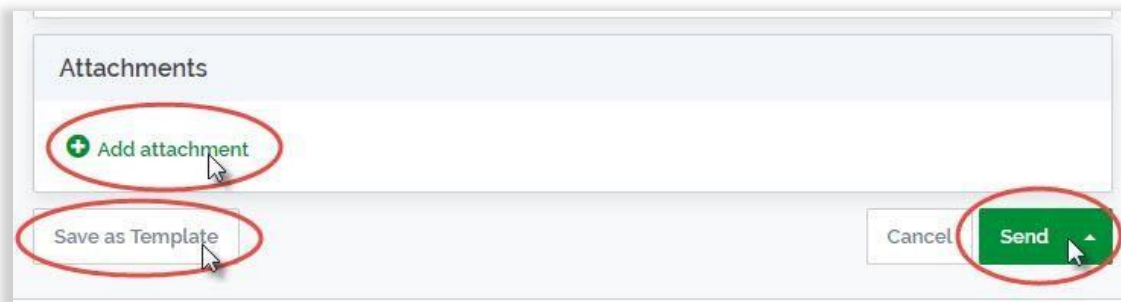
Branch Code
[Input Field]

+ Add Account

Additional Payment Method
[Input Field]

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.
- 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.

- Go to the tab **Customer directory, Search & Add Customers**
 - Search for the customer you wish to add.
 - You can search either by company name or a company identification number (i.e. VAT-number, organization number, IBAN).
 - When you find the correct recipient, click on **Add**.
 - 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.
 - 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.

PAGERO

Language: english ▼

Logged in as: Demo Outbound, Demo Outbound
Customer number: DEMO

Start

Pagero Web Portal

Customer directory

My Customers

Search & Add Customers

Suggest New Customers

View requests

Increase My e-Flow

Email distribution

Supplier directory

My documents

Settings

Messages (1)

Support

Logout

Pagero Connect

1 new message

Search & Add Customers

Here you can search for customers in Pagero's public customer directory. The customers you want to send documents to or receive documents from can then be added to your customer directory.

Search

Search instructions

Show companies that:

Company name:

☐ Search for similar name

Id: (VAT, EAN, IBAN, OVT, orgno)

Service provider:

Search results

Company name	Service provider	
Demo Inbound Portal	Pagero	<input type="button" value="Add"/>

Showing 1 to 1 of 1

Rows per page: 20 ▼

We recommend you to search on a company ID-number to get the most accurate result.

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/>