# USER GUIDE
# PAGERO ONLINE 2.0

## Dear Pagero customer,

Here at Pagero, we work day and night to develop, simplify and improve the conditions for the essence of our business; our customers. Pagero has an aim to incessantly look forward and develop our products to offer and provide our customers with the tools they need and demand to be able to facilitate, cost effect and save time during the daily business activity. The tool of Pagero is Pagero Online, a platform born just 2 years ago. Many things have happened since then.
Now it is time for a new milestone in the history of Pagero; The 2.0 version of Pagero Online.
We are convinced that the news in the 2.0 version are to be welcomed and appreciated.
Read more how this affects you, followed by an easy instruction of how you easily can take part of the new possibilities that the 2.0 version brings.

## Background

Before the 2.0 version, the Pagero recipients register were divided into 3 parts:

- Every user had a recipient directory (list of customers) of their own with recipients disposed by themselves.
- Every e-invoice service provider had a directory with recipients. Pagero users could only send to the recipients in the directory that had the same service provider as themselves, meaning that both the seller and the buyer needed to have an agreement with the same service provider.
- Pagero had a recipient directory with recipients that every user could send to. Nevertheless, it was difficult for the user to see who these recipients were as the register was not traceable nor public.

We wanted to facilitate this process relieving the users of having to create their own customer directory from scratch resulting in many duplicates of the same recipients in the Pagero database. Furthermore we wanted to create a possibility for the users to see what recipients are actually accessible and at the same time inform the users of the special agreements that can be needed to enter to be able to reach to a certain recipient. We also wanted to improve the appearance in Pagero Online. Therefore, we turned it inside out and came to the following conclusion:

## The new recipient directory

In the new solution we have created a recipient directory that is public and traceable for all the users. The user can now create “connections” to recipients in the public traceable recipient directory, instead of dispose recipients of their own each time.
To start with, this directory will contain:

- All Pagero customers in Pagero Online that are able to receive invoices will become accessible in the public register.

- All customers disposed in the customer’s private customer directory will become accessible in the public register, after the disposed information has been verified.

- All the service provider recipient directories will become accessible and searchable in the new public register.

The public Pagero recipient directory will therefore expand by means of the Pagero users. Recipients disposed by users will be verified before they go public.

## The customer directory (the users private address book)

A user has a customer/recipient "address book" of their own, called *My Customer Directory* . This **customer directory** does not contain the recipients, but a connection to the recipients in the public Pagero recipient directory.

When a user wishes to add a new recipient to the private customer directory the user starts by searching the public Pagero recipient directory. When the recipient is found it is added by a simple click on an add-button opening the new customer settings page where the user can configure and setup specific settings for this specific recipient. The recipient is then saved to the private customer directory enabling the user to start sending e-invoices.
Some worth to mention configuration possibilities per recipient in your private customer directory are:

- **Customer number (ERP-id):** A customer number that you use for a customer/recipient in your ERP-system can be added to the recipient in your private customer directory. It's possible to add several customer numbers per customer.
- **Supplier ID (reference):** A supplier can have several different supplier Id:s that the buyers expect to receive with every invoice. Therefore it's now possible to add a Supplier Id per customer/recipient if needed.
- **Customer Addresses:** Sometimes the supplier's information about the buyer's address does not match the address given in the public Pagero recipient directory. In this case the user (supplier) can add several addresses to their customer/recipient in the private customer directory.

## Pagero Online face lift

We have redesigned all the user pages in Pagero Onine and given it a brand new look. The navigation links were before 2.0 found in the top of the page and have now been moved to the left side instead. The structure of the Pagero Online web page remains the same as before. Some pages have been cleaned up and better organized by the usage of tabs.

## Compliant digital signatures and archive

The legislation of e-invoicing varies in almost every country. Even within the EU each member state has interpreted the directives differently when outlining the domestic terms and conditions of e-invoicing. The tax agencies of most countries require that both the seller digitally signs the e-invoice before archiving. The digital signed invoice is considered to be the legal binding document. The buyer who receives the digital signed invoice is required to validate the signature before archiving.

To help our customers to be able to send and recveive e-invoices with business partners in different countries thus sending cross-border, we have fully integrated a signing service, TrustWeaver On Demand, that guaranties and issues compliant digital signatures that meet the different local legal requirements when e-invoicing.

We have also adjusted and made some improvements to our long-term electronic archive to make sure that we are compliant with all the different legal requirements.

Please contact Pagero to learn more about this and how we can help you start e-invoicing with your business partners in other countries.

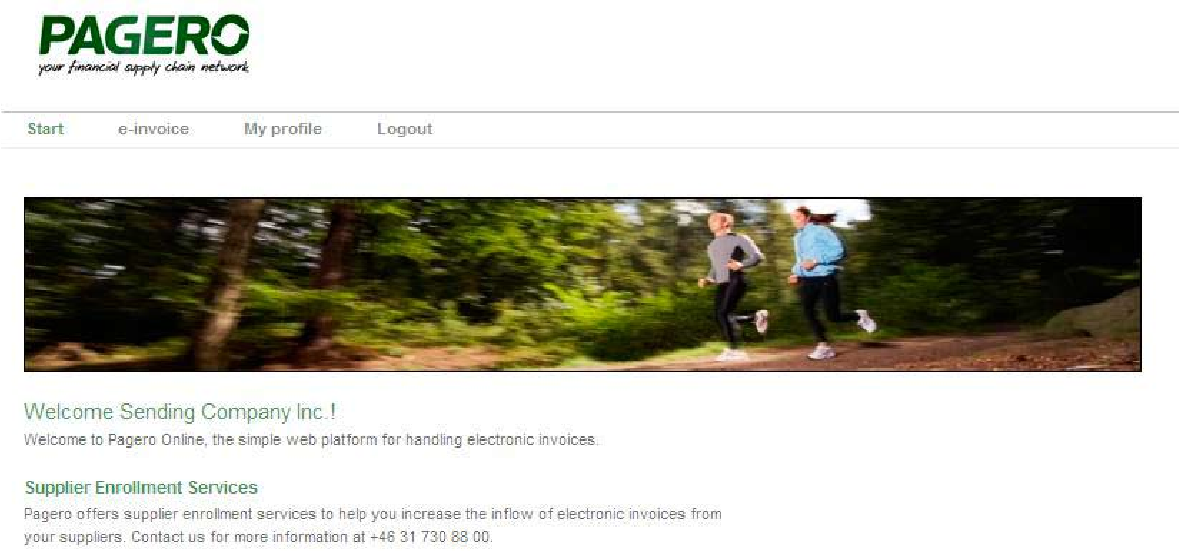
# Guide

As mentioned earlier, the make-over briefly means that there is one public Pagero recipient directory to search and choose from instead of having several recipient directories and one per customer account.By simply clicking on a listed recipient in the public directory you can add this one to your own private customer directory in order to define the recipients that you will be sending e-invoices to. As a result of this new basic principle managing e-invoice recipients, we have created several new functions and setting possibilities that facilitates and enhances the overall conditions. In this following section you will learn about the new enhancements followed by a guide on how to best proceed to manage your e-invoicing, using the new Pagero Online.

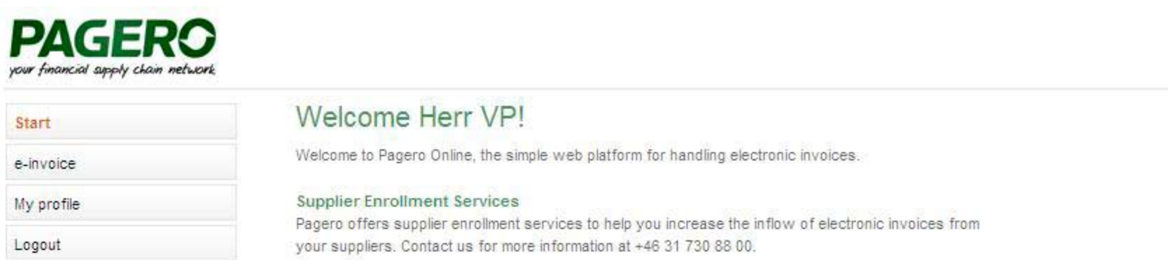
## 1.0 NEW DESIGN

### 1.1 The Start page

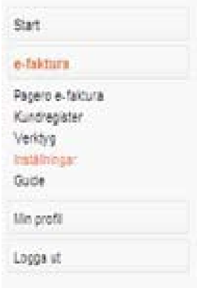
Before 2.0, the start page looked like this : The navigation links were found at the top of the page.




The new Pagero Online looks like this: The navigation links have been moved to the left side.



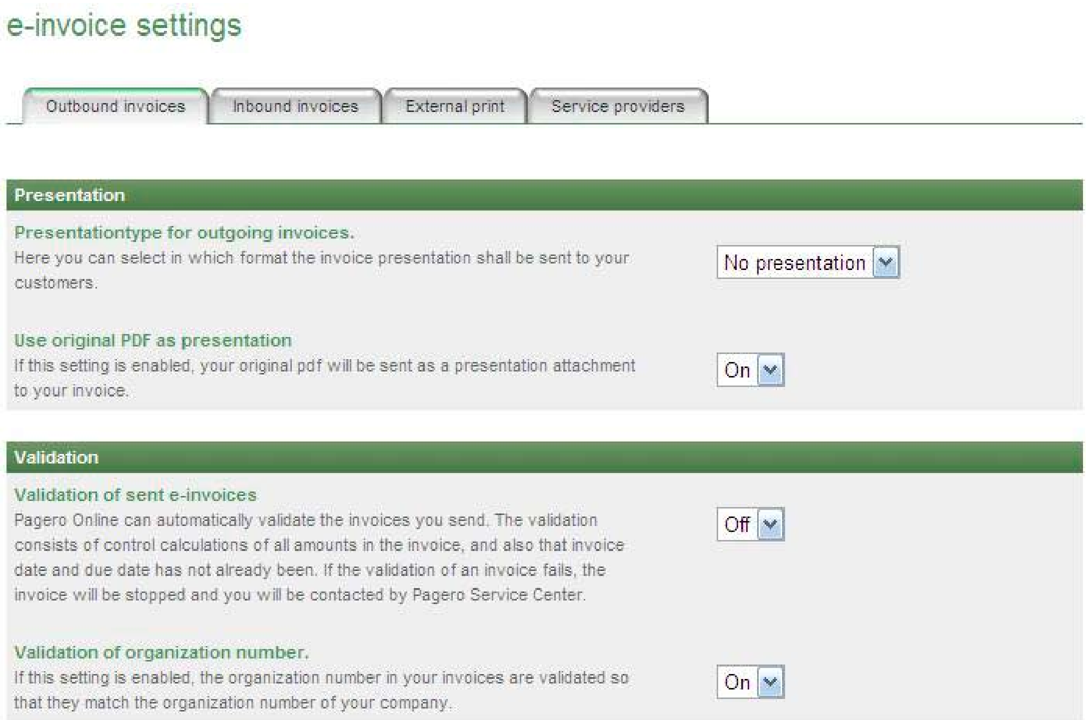
## 1.2 The navigation




The main navigation links remain the same as before *(Start, e-invoice, My profile and Logout)*, but they have been moved to the left side.

By clicking on a main navigation link a sub menu appears. The displayed page is marked orange as shown in the illustration to the left.

Some pages have been organized into different tabs where you will find additional settings and alternatives.


The image above illustrates a random section of the e-invoice Settings page. This gives you an example of how the pages have been restructured, organized and cleaned up in order to facilitate the settings you want to verify/manage.
If you do not have the exact same tabs as shown in the above example, this is due to you having a different service agreement setup than the user in this example, thus different setting possibilities.

## 2.0 PAGERO RECIPIENT DIRECTORY

All the existing invoice recipients in your Pagero Online account prior to the release of version 2.0, 21th of June, will remain intact, saved and automatically imported into your new "Customer Directory". The main difference is that your invoice recipients also will be copied, moved and sorted into the public Pagero recipient directory.
The Pagero recipient directory enables you to search new customers/recipients that you wish to send e-invoices to.

When entering the Pagero Recipient directory page all the public available recipients are listed:

| Company name | Service providers | |
|---|---|---|
| | Svenska Handelsbanken | |
| 21grams Customer AB | Pagero | Add |
| Air Baltic Corporation | Svenska Handelsbanken, Swedbank | |
| Antarcticopy | Svenska Handelsbanken, Swedbank | |
| Autohaus Mielberg KG | Svenska Handelsbanken, Swedbank | |
| BYT-KOMPLET s.r.o. | Svenska Handelsbanken, Swedbank | |
| Customer 900 | Pagero | Add |
| Designstudio Gmunden | Svenska Handelsbanken, Swedbank | |
| Englunds Kontorsmöbler AB | Svenska Handelsbanken, Swedbank | |
| Fotograferna AB | Svenska Handelsbanken, Swedbank | |
| Showing 1 to 10 of 26 | | << < 1 2 3 > >> |

*Figure 2.1) Table of all the public recipients*

It is easy to explore the entire directory by simply clicking the numbers (1,2,3…,6) or the arrows found in the bottom right of the table *(See figure 2.1)*.

If you wish to get more detailed information about a recipient, simply click on that particular recipient in the list. Detailed information will appear directly under the recipient directory table. Here you will find information about the recipient's address, organization number, VAT number etc:

| | | | |
|---|---|---|---|
| Address: | Designstudio Gmunden<br>Seepromenade 1b<br>4810 Gmunden<br>Austria | Organization number:<br>VAT number:<br>EAN-number: | 666666-6666 |

*Figure 2.2) Detailed information about a recipient.*

### 2.1 Search Customers/Recipients

You can simply search a specific customer or a recipient by using the search function found in the same page above the public recipient directory table:

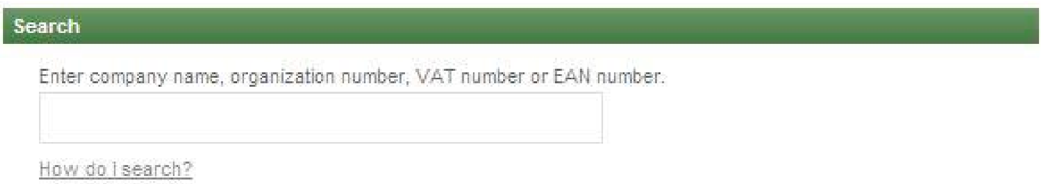



*Figure 2.3) Search Box*

You can search either by typing a company name, organization number, VAT number or EAN number. If you for example wish to search and list all the recipients that begin with the letter "P", you can do so by using a so called wild card. If you type the letter P followed by a star (P*), all the recipients that begin with the letter "P" are listed below. It is possible to even search recipients that begin with the letter "P" and ends with "ERO". To perform such a search simply type P*ERO.

### 2.2 Add a new customer to your customer directory

When you find a customer in the public Pagero recipient directory that you wish to send e-invoices to you need to add this customer to your private customer directory. This is accomplished by a simple click on the link to the right of the customer where it says “Add” *(See figure 2.1).*

You will then be redirected to a new page where you can perform additional settings for this particular customer. You can for example add your own customer number (ERP-id) that you have in your ERP-system. You can add several customer numbers (ERP-ids) to the same customer. When finished click the save button.

If you do not see the ”Add” link to the right of the customer that you wish to add this is because you do not have the service agreement setup needed in order to reach this particular customer. Please contact the Pagero Service Center, they will help you to setup the needed agreements.

## 3.0 MY CUSTOMER DIRECTORY

This is your private Customer Directory where you will find all the customers/recipients that you have added from the public Pagero Recipient Directory.
When you enter this page all your added customers are listed in the Customer Directory table:

**Search results**

| Company name | Service provider | |
|---|---|---|
| Bosses bil | Svenska Handelsbanken | Settings |
| Designstudio Gmunden | Svenska Handelsbanken | Settings |

Showing 1 to 2 of 2 << < 1 > >>

*Figure 3.1) Customer directory table*

It is easy to explore the entire directory by simply clicking the numbers (1,2,3…,6) or the arrows found in the bottom right of the table *(See figure 2.1).* If you wish to get more detailed information about a recipient, simply click on that particular recipient in the list. Detailed information will appear directly under the recipient directory table. Here you will find information about  the recipient’s address, customer number (ERP-id), organization number, VAT number etc:

Showing 1 to 2 of 2 << < 1 > >>

| | | | |
|---|---|---|---|
| **Address:** | Designstudio Gmunden | **Customer number:** | 37568 |
| | Seepromenade 1b | **Organization number:** | 666666-6666 |
| | 4810 Gmunden | **VAT number:** | |
| | Austria | **EAN-number:** | |

*Figure 3.2) Detailed customer information*

### 3.1 Search a specific customer

You can easily search your Customer Directory for a specific customer by using the search function found above the customer directory table *(For more information on how to search see section 2.1)*.

### 3.2 Change the settings for a customer/recipient

If you wish to change the settings for a specific customer in your customer directory, click on the green link “settings” to the right of the customer in the customer directory table *(See figure 3.1)*. You will be redirected to the Recipient setting page *(see section 4.0 about Recipient settings)*.

### 3.3 Not available and Inactivated customers

Some customers/recipients in your customer directory can be marked Not available or Inactive:

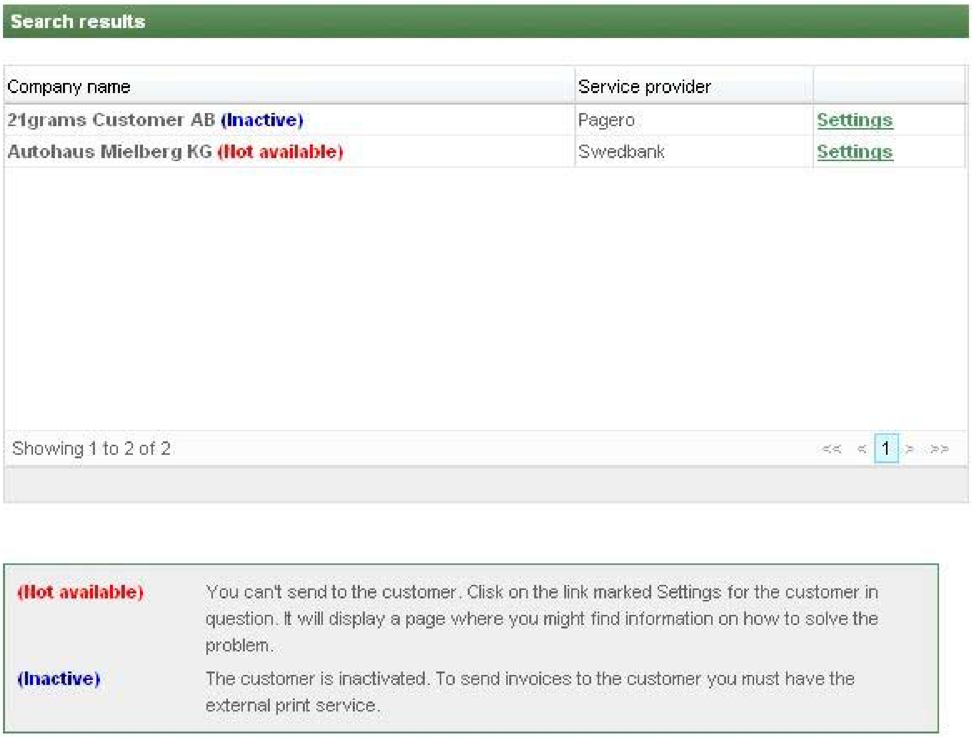



*Figure 3.4) Highlighted customers*

If you see the text *Not available* in red on the customer in your customer directory this means that you are not able to send e-invoices to this particular customer. This may be due to various reasons. Either you do not have the needed service agreement setup (agreements with particular service providers) in order to reach this customer or your e-invoice provider(s) no longer can reach this particular recipient for any reason.

Click the green “settings” link to go to the Recipient Settings page to get more detailed information about this error or to get more suggestions on how to solve this issue *(see section 3.2)*.

If a customer in the customer directory table is marked *Inactive* in blue it means that the customer has been deactivated.

Note that If you have the External Print service with Pagero, this means that all the invoices to a deactivated recipient will be sent to the external printing service resulting in paper invoices instead of e-invoices. This can be useful if your customer is experiencing temporary difficulties receiving e-invoices, and wish a temporary paper invoice instead.
To reactivate the customer/recipient go to the customer settings page by clicking the settings link to the right of the customer *(see section 3.2)*.

## 4.0 RECIPIENT SETTINGS

The recipient (customer) settings page is displayed either when you add a new customer/recipient to your private customer directory from the public Pagero recipient directory *(see section 2.2)* or if you click the “settings” link to the right of the listed customers in your private customer directory *(see section 3.2)*.

The setting page is divided into two sections; Basic settings and Advanced settings.

### 4.1 Basic Settings

The Basic settings section can vary depending on which e-invoice service providers you and your customer use for e-invoicing services.

If you and your customer only have one e-invoice service provider, Pagero for examlpe, the basic setting page will look like this:

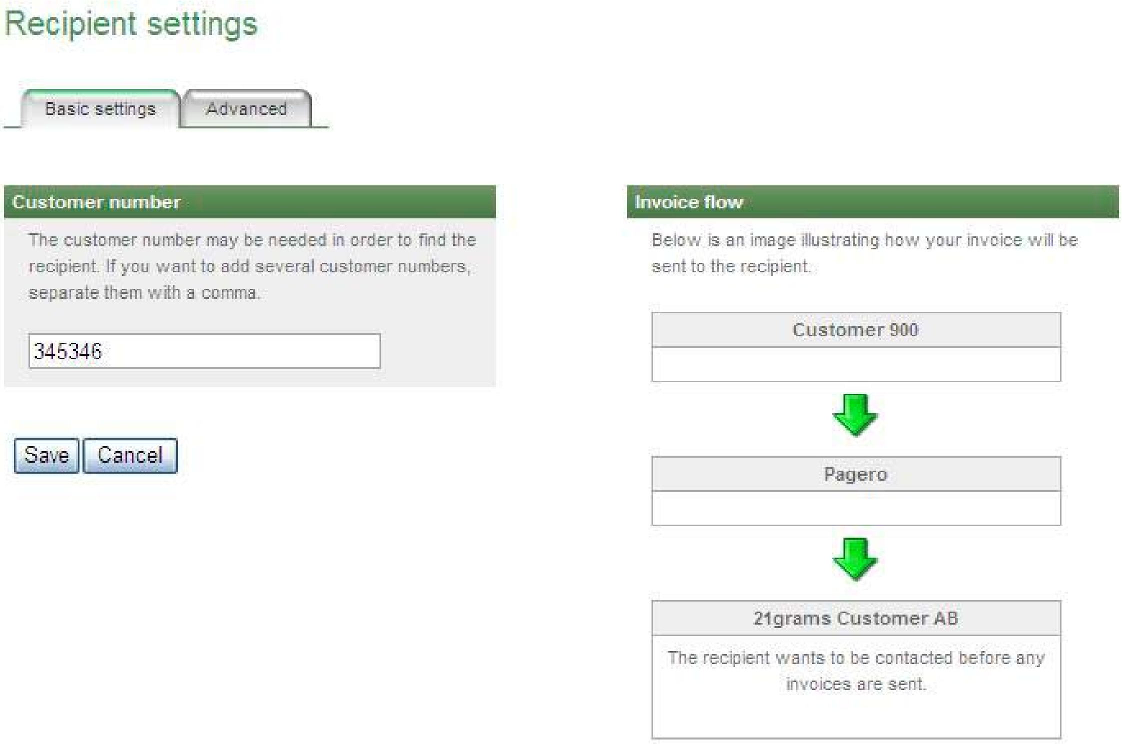



*Figure 4.1) Basic settings with one service provider*

But if your customer and you both have several e-invoice service providers the page will look like this:

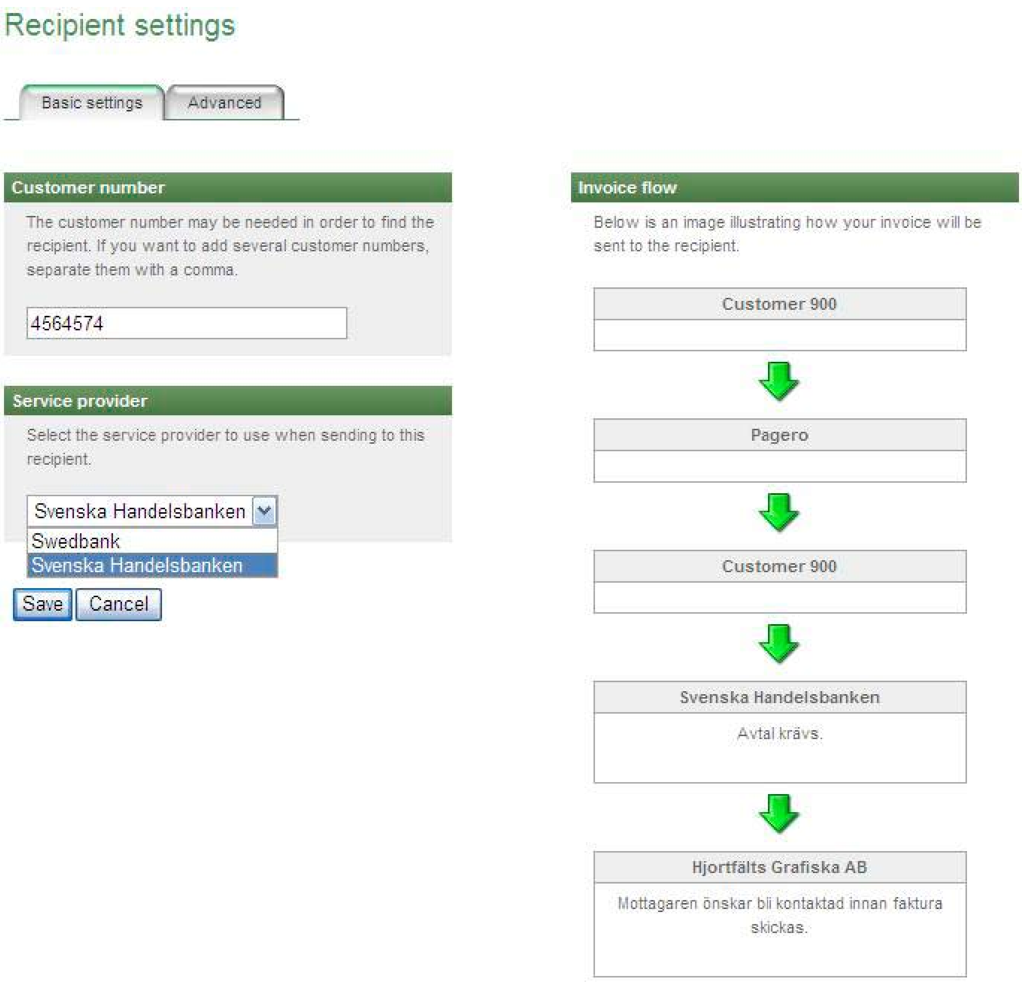



*Figure 4.2) Basic Settings with more than one service provider*

This scenario means that you have several options how to reach this customer (routing possibilities). Choose in the drop down menu which service provider you wish to use for sending e-invoices to a customer.

### 4.2 Invoice flow chart

To the far right of the page you will see an illustration showing how your invoices will be sent to your customer. This is to make it easier to see all the involved service providers, VANs etc and to get information about certain agreements that you might need to sign in order to reach certain recipients etc *(see figure 4.2).*

### 4.3 Advanced settings

Click on the *Advanced* tab in the recipient settings page to get to the Advanced settings page. This page might appear a bit different from case to case depending on whether your chosen e-invoice service provider has got more than one send configuration possibilities. For the most part, when the service provider only has got one send configuration possibility, it will appear like this:

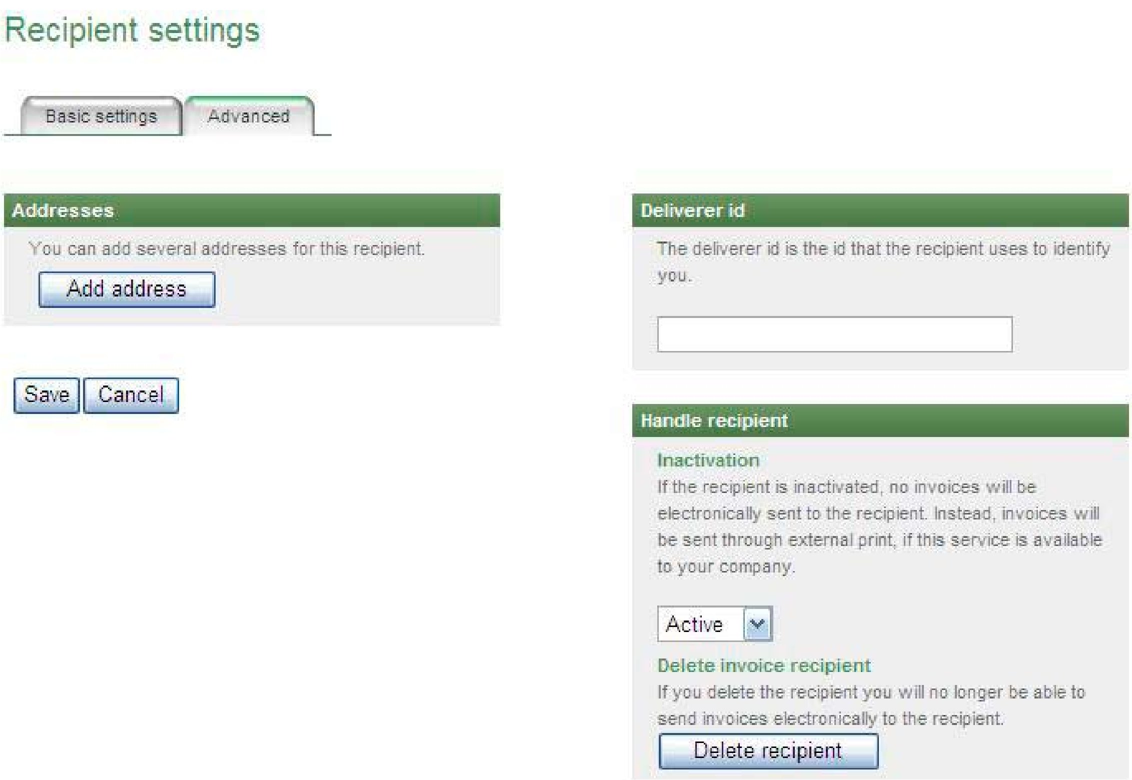



*Figure 4.3) Advanced settings*

For the most part, you will not have to think about these settings as they are done automatically without any intervention. However, situations might arise where you want to reach a customer/receiver in a specific way.
Please contact Pagero if this would occur.

## 5.0 INVOICE HISTORY

The invoice history page has been improved to facilitate searching and listing sent or received e-invoices:

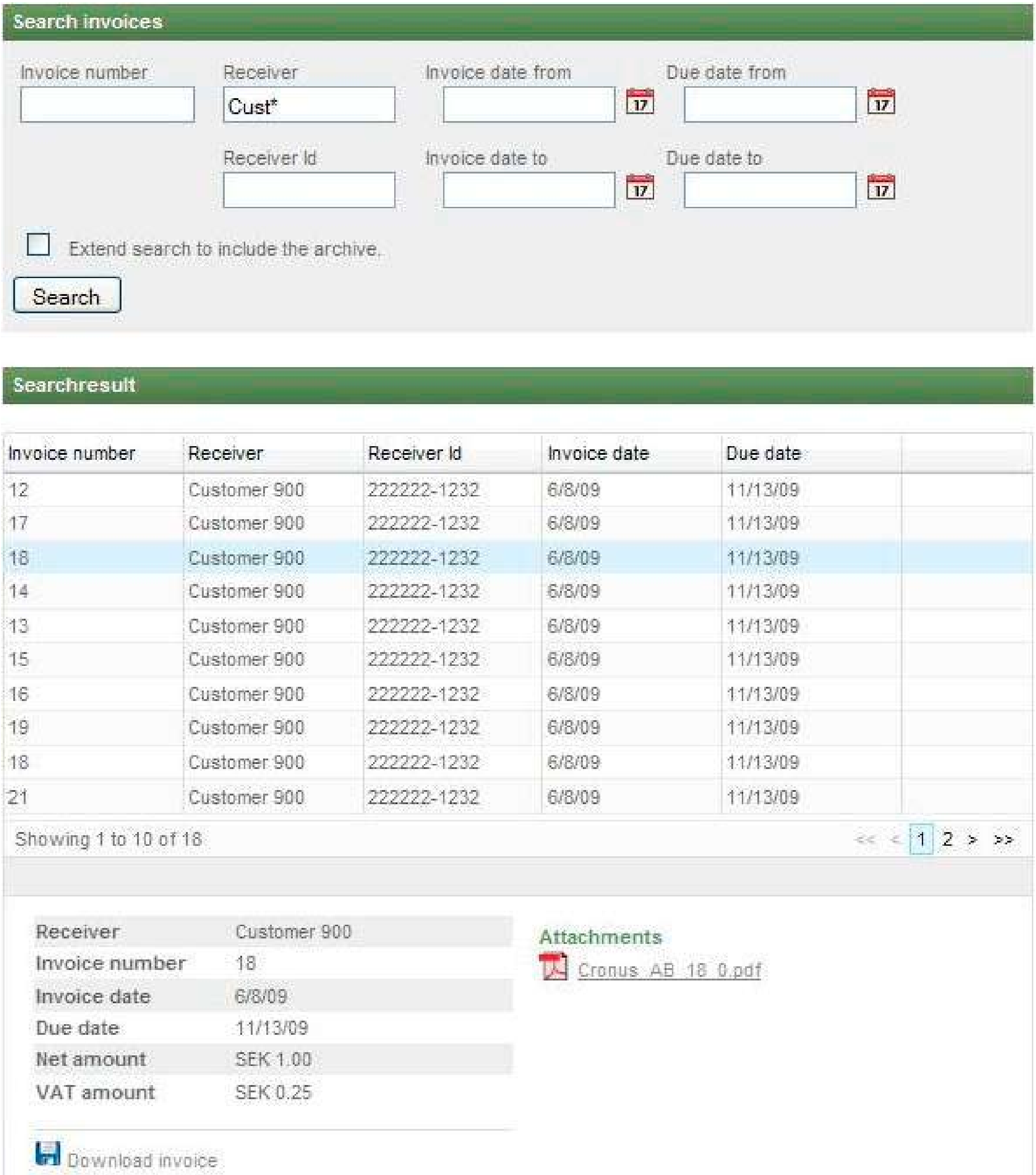



*Figure 5.1) invoice history page*

The page is divided into three sections; the search tool, the invoice history table and the detailed invoice information display *(see figure 5.1)*.

### 5.1 INVOICE HISTORY TABLE

This is the section where the invoices are listed. If you skip to fill in any variables in the search tool boxes all the sent invoices are listed in the invoice history table. Simply click the numbers or arrows in the bottom right of the table to flip through all the listed invoices.

### 5.2 SEARCH AND FILTER INVOICES

You can search and filter the search result using the following variables; name of the recipient, invoice number, invoice dates from/to and due dates from/to. Fill in the boxes in the top of the page and click the search button. The invoices are listed and filtered below in the invoice history table.
To list invoices sent to a specific customer fill in the name of the customer in the receiver box. Only invoices sent to this specific customer will be listed below.

If you wish to see a specific invoice you can fill in the invoice number and click the search button.
Use the *from* and *to* boxes if you wish to filter the search result displaying only invoices sent during a specific period. You can choose to filter either by invoice dates or by due dates. Click the calendar icon and set a date or just type the date in the boxes. *(see figure 5.1, top)*

### 5.3 DETAILED INFORMATION

To get detailed information of a listed sent invoice or if you like to download a specific invoice, click once on it in the invoice history table, and detailed information will be displayed in the detailed information display right under the invoice history table. *(see figure 5.1)*

If you wish to download it, just click the download icon in the bottom of the page. Attachments can be viewed or downloaded as well.

### 5.4 SEARCH THE LONG-TERM INVOICE ARCHIVE

This option is only available for Pagero customers with the Pagero eArchive service activated. Note that this is an optional service and requires an additional agreement with Pagero. Please contact us to learn more about the terms and conditions or to sign up.

To search your archived invoices (older than 60 days) simply click the check box in the search tool section where it says Extend search to include the archive, click the search button and the archived invoices will be included in the search result listed below. If the archived invoice is digitally signed this will be presented in the detailed information display at the bottom of the page.

In short, the archive will include extended functionalities regarding revalidation of signed invoices. Revalidation will be possible to be carried out directly from this page, including complete validation reports.

If you have any further questions please feel free to contact us:

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