



Pagero Invoice Portal 2.0

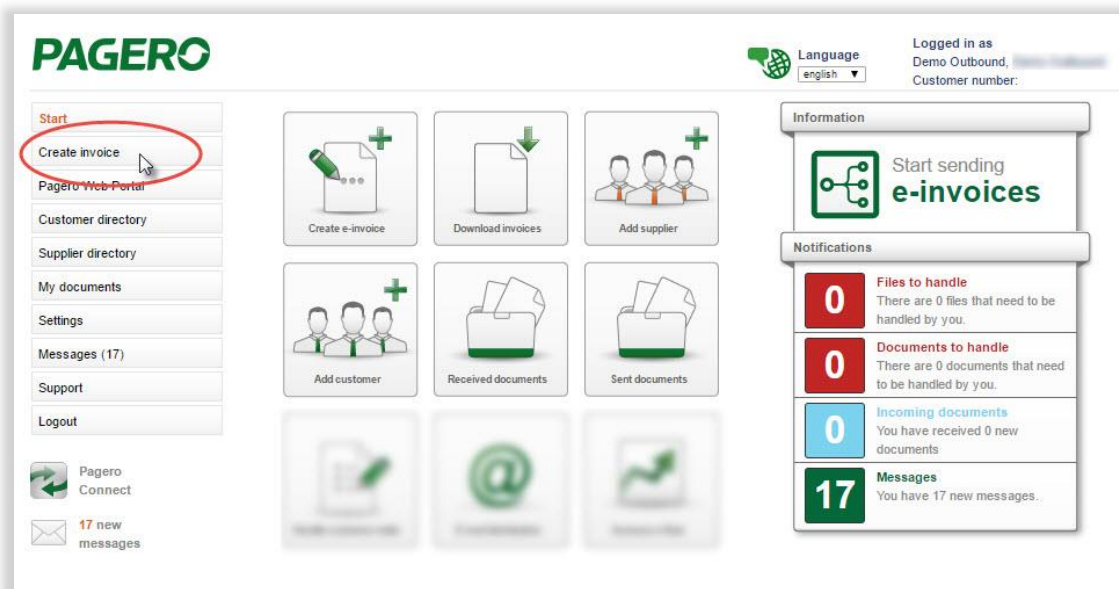
Create and send invoices



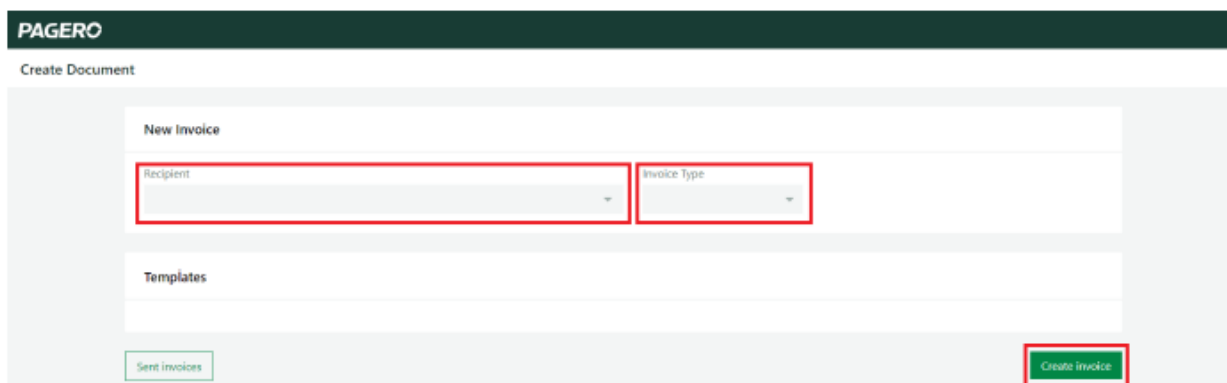
Guide till Pagero Invoice Portal 2.0

Create and send invoices

1. Log in to your Pagero Online account.
2. Click Create invoice



3. 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.



The screenshot shows the 'Create Document' form. The 'New Invoice' section has two dropdown menus: 'Recipient' and 'Invoice Type', both highlighted with red boxes. Below this is a 'Templates' section. At the bottom, there are two buttons: 'Send Invoices' and 'Create Invoice', with the latter highlighted in a red box.



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

Recipient Details ▾

Customer Number Edit	Organisation Number
1122	000000-0018

Delivery Address Edit	Invoice Address Edit
	Demo Example Company 1 SE

5. Fill in the invoice details. If needed, additional fields can be added, by click **Add 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.

Invoice Details ▾

Invoice Number*	Purchase Order Number	
<input type="text"/>	<input type="text"/>	
Invoice Date*	Buyer Contact	
2019-05-28	<input type="text"/>	
Payment Terms	Overdue Fine (%)	Buyer Reference
<input type="text"/>	<input type="text"/>	<input type="text"/>
Due in Days	Due Date*	Message to Receiver
<input type="text"/>	<input type="text"/>	<input type="text"/>

[Add Fields](#)

Invoice Details ✕

Please select additional fields

- Seller Supplier ID
- Seller Order Number
- Seller Order Date
- Seller Contact
- Purchase Order Date
- Agreement Id
- Agreement Date
- Buyer's Contract Number
- Buyer's Contract Date
- Invoice Period
- OCR
- Delivery Date
- Delivery Terms
- Delivery Method
- Cost Center

6. 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 **Add field to all rows** on the bottom left. 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 from 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).



Articles ▾
All rows ✕

Article Number	Article Name*	Quantity*	Unit*	Unit Price*	VAT %*	Net Amount	
Article No	Article Name	Quantity	Unit	Unit Price	25		+ 🗑️

Add Row
Add field to all rows
Expand All
Collapse All

Discounts and Charges ▾

All rows
Please select additional fields

- Seller Order Number
- Seller Order Date
- Purchase Order Date
- Purchase Order Number
- Buyer Article Number
- Buyer Row Number
- Row Specification
- VAT Exemption
- Discount
- Delivery Reference
- VAT Withholding

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

Discounts and Charges ▾

Discounts

Description	Discount Rate (%)	Net Amount*	VAT %*	
Example discount		100	25	+ 🗑️

Add Discount
Add field to all rows
Expand All
Collapse All

Charges

Charge Type*	Description	Net Amount*	VAT %*	
Freight ▾	Example charge	10	25	+ 🗑️

Add Charge
Add field to all rows
Expand All
Collapse All

1) If a discount or charge should be tax exempt, click the **plus** sign to add this information.

Discounts and Charges ▾
Discounts: Example discount ✕

Discounts

Description	Discount Rate (%)	Net Amount*	VAT %*	
Example discount		100	25	+ 🗑️

VAT Type	VAT Exemption
▾	

Add Discount
Add field to all rows
Expand All
Collapse All

Charges

Charge Type*	Description	Net Amount*	VAT %*	
Freight ▾	Example charge	10	25	+ 🗑️

Add Charge
Add field to all rows
Expand All
Collapse All

Discounts: Example discount
Please select additional fields

- VAT Exemption

8. If needed, change the currency, and choose if you wish to use rounding. If needed, additional fields can be added, by click **Add fields**.



Invoice Total ▾

Currency*

Rounding

Net Amount	0.00
VAT	0.00
Amount to pay	0.00

9. Add payment method. To change payment method, click the drop-down list.
 - a. You can add several payment methods, by clicking **Add Account** and choosing the account type you wish to add from the drop-down list.

Sender Details ▾

Accounts

Account Type *	Account Number *	BIC / SWIFT	Branch Code	Bank Code
Bank account ▾	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

This information can be added once and thereafter automatically be inserted to the invoice:

- b. Click, the left-hand side in the main menu, on **Settings** and then **Company information**
- c. Click on the tab **Portal settings**
- d. Add the information and **Save**

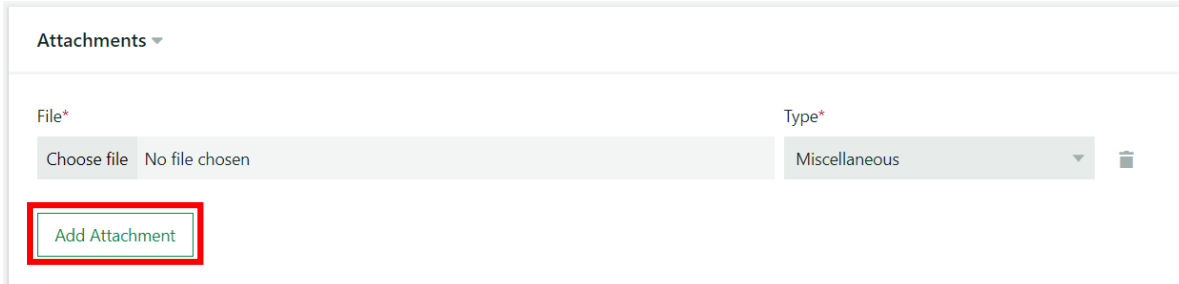
Company information

Basic settings Security settings Service provider settings **Portal settings**

Information that you enter in the fields below are automatically inserted into invoices that you create with the Pagero Web Portal.

Accounts	Other information
<p>Account</p> <p>Account type <input type="text" value="PLUSGIRO"/></p> <p>Account number <input type="text"/></p> <p>Currency <input type="text" value="Choose One"/></p> <p>BIC (Swift) <input type="text"/></p> <p>Branch code <input type="text"/></p> <p>Bank code <input type="text"/></p> <p>Delete</p>	<p>Web address <input type="text"/></p> <p>(e.g. www.pagero.com)</p> <p><input type="button" value="Save"/></p>

10. If you wish to add other attachments, click **Add attachment** to add the attachment and then choose **Type** of attachment.



Attachments ▾

File* Type*

Choose file No file chosen Miscellaneous ▾


Add Attachment

11. Once the invoice is complete you can proceed and send the invoice by clicking **Send invoice** 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.



Cancel invoice **Save as template** Preview Send invoice ▾

- Additionally, you can choose to preview the invoice before sending it. The purpose of this function is to ensure fields have been filled in correctly.



Cancel invoice Save as template **Preview** Send invoice ▾

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

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

Showing 1 to 1 of 1

Rows per page 20

Support

Do you have any questions?

Contact [Pagero Service & Support Center](#)

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/>