

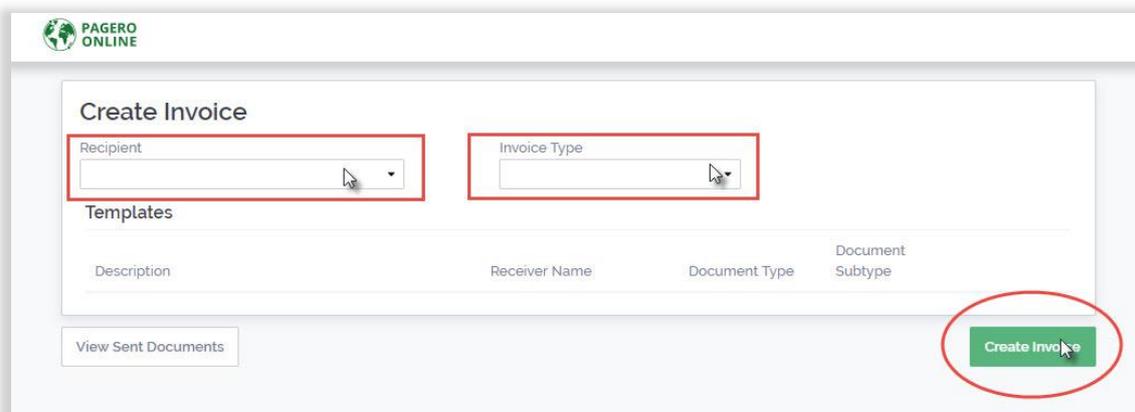
Guide Pagero Invoice Portal

Create and send invoices

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

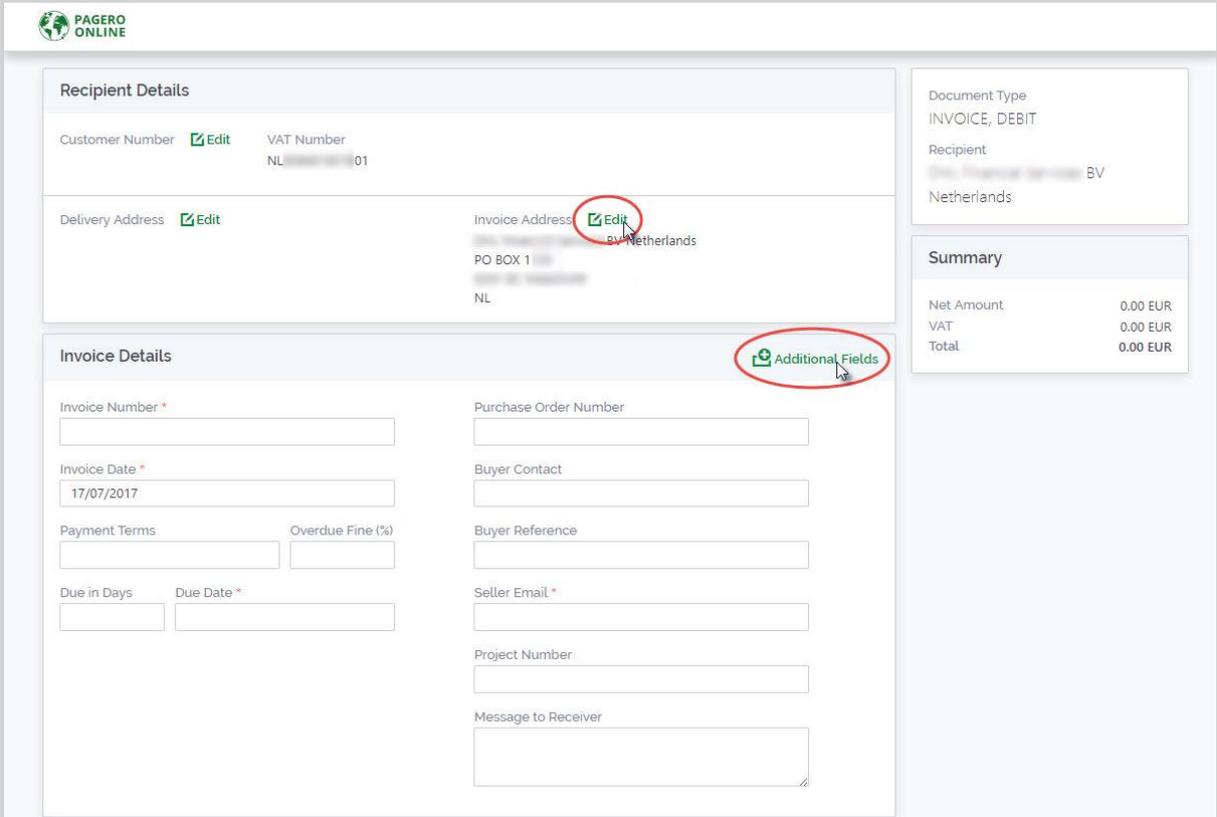


3. Choose the recipient you wish to send a document to, and the type of invoice you wish to create (debit or credit). If you can't find the recipient in the drop-down menu, you need to add them in your customer directory in Pagero Online. Information on how to add customers can be **found in the end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



4. 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**.

5. 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](#)
by Netherlands
PO BOX 1
NL

Invoice Details [Additional Fields](#)

Invoice Number *

Invoice Date *
17/07/2017

Payment Terms Overdue Fine (%)

Due in Days Due Date *

Purchase Order Number

Buyer Contact

Buyer Reference

Seller Email *

Project Number

Message to Receiver

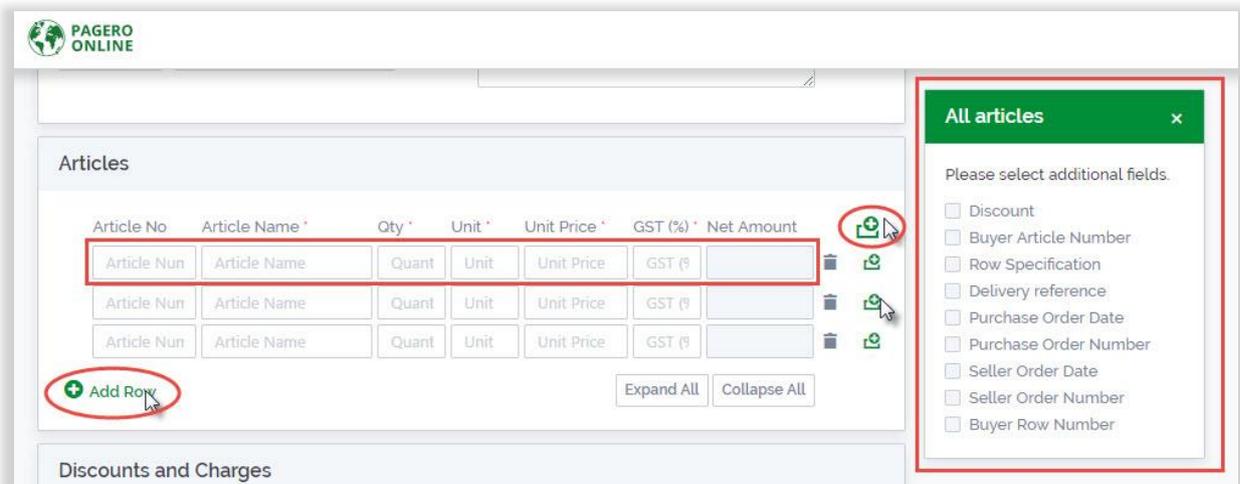
Document Type
INVOICE, DEBIT

Recipient
BV
Netherlands

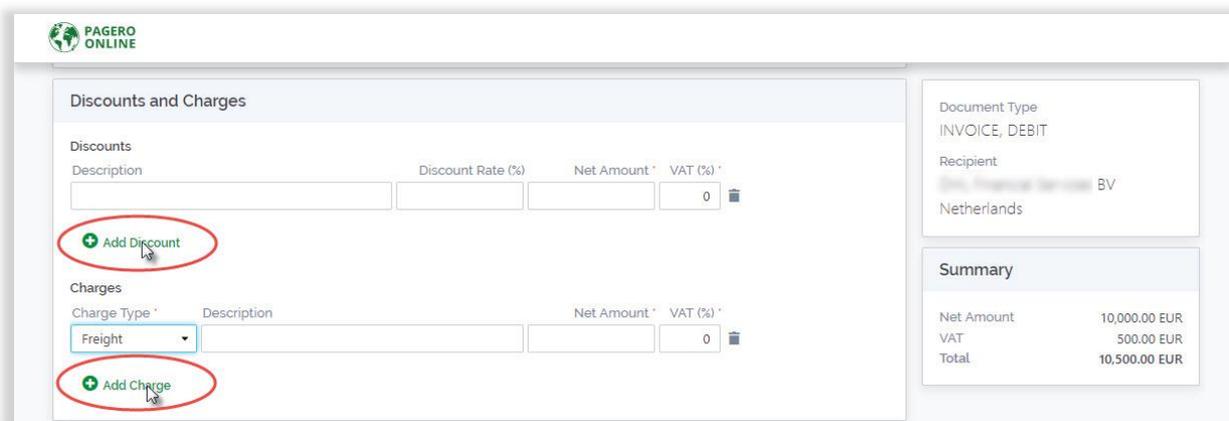
Summary

Net Amount	0.00 EUR
VAT	0.00 EUR
Total	0.00 EUR

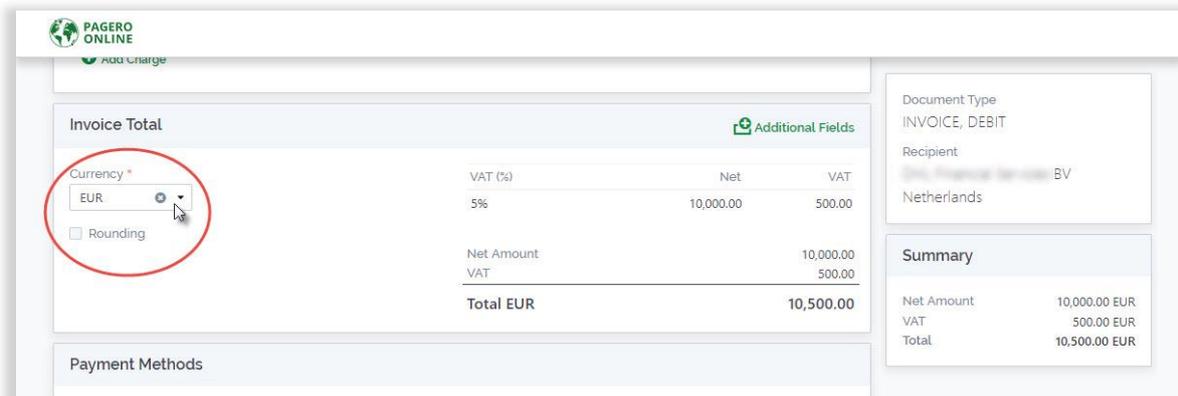
6. Articles – Add information about the articles of the invoice.
 - a. Add more rows by click **Add Row**.
 - b. If needed you can add additional fields to all rows, by click the plus symbol on the top right. If you wish to add a field to only one specific row, click the plus sign on that row. Choose 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).



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



8. 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

Document Type
INVOICE, DEBIT

Recipient
Dco. Financial Services BV
Netherlands

Summary

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

Payment Methods

9. 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 * Account Number * BIC / SWIFT Branch Code

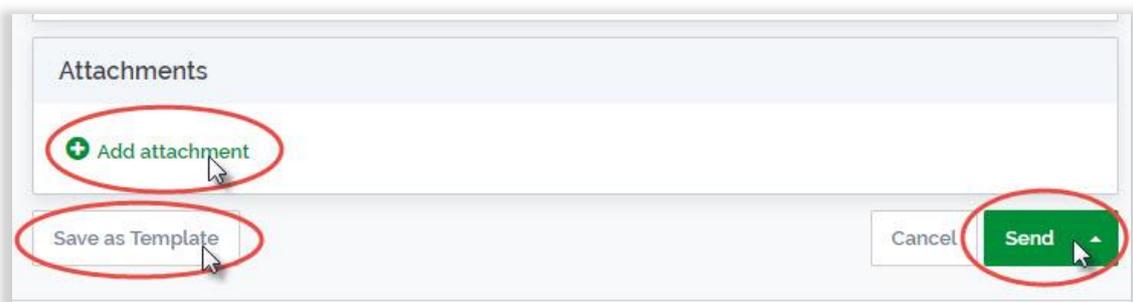
Bank account

+ Add Account

Additional Payment Method

10. 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.

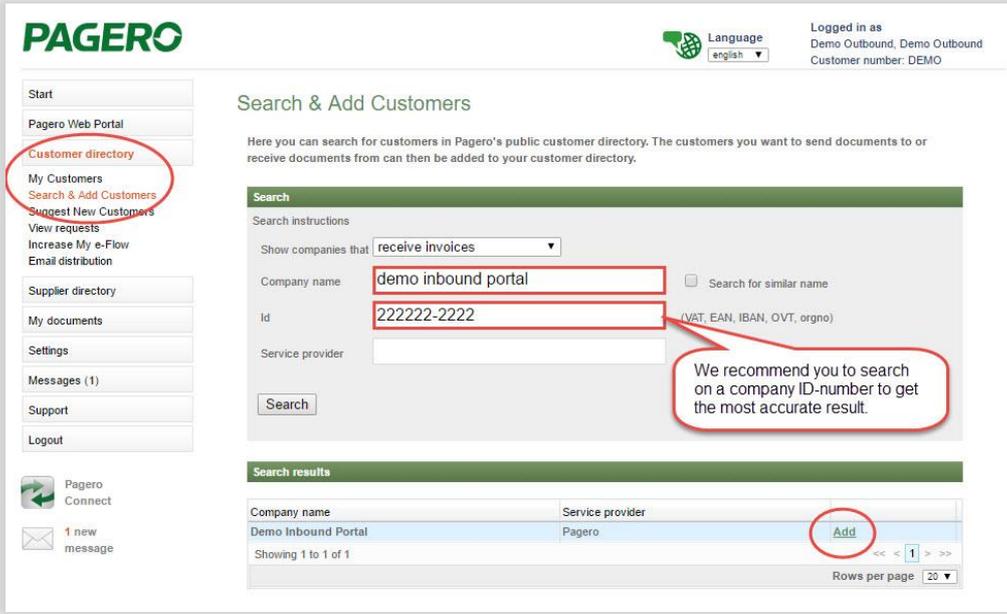
11. Once the invoice is complete you can proceed and send the invoice, by click Send in the lower right corner.
 - a. You can also choose to save your invoice as a Template, the template can be used the next time you wish to send an invoice to this recipient. All information saved in the template will 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.



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 receive invoices

Company name demo inbound portal Search for similar name

Id 222222-2222 (VAT, EAN, IBAN, OVT, orgno)

Service provider

Search

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

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

<https://pageroab.zendesk.com/hc/en-us/requests/new>

or call +31852080987

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/>