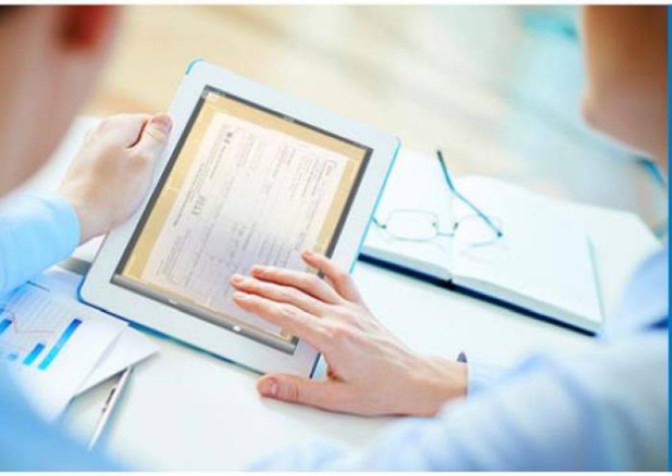


Get started with the Invoice portal!

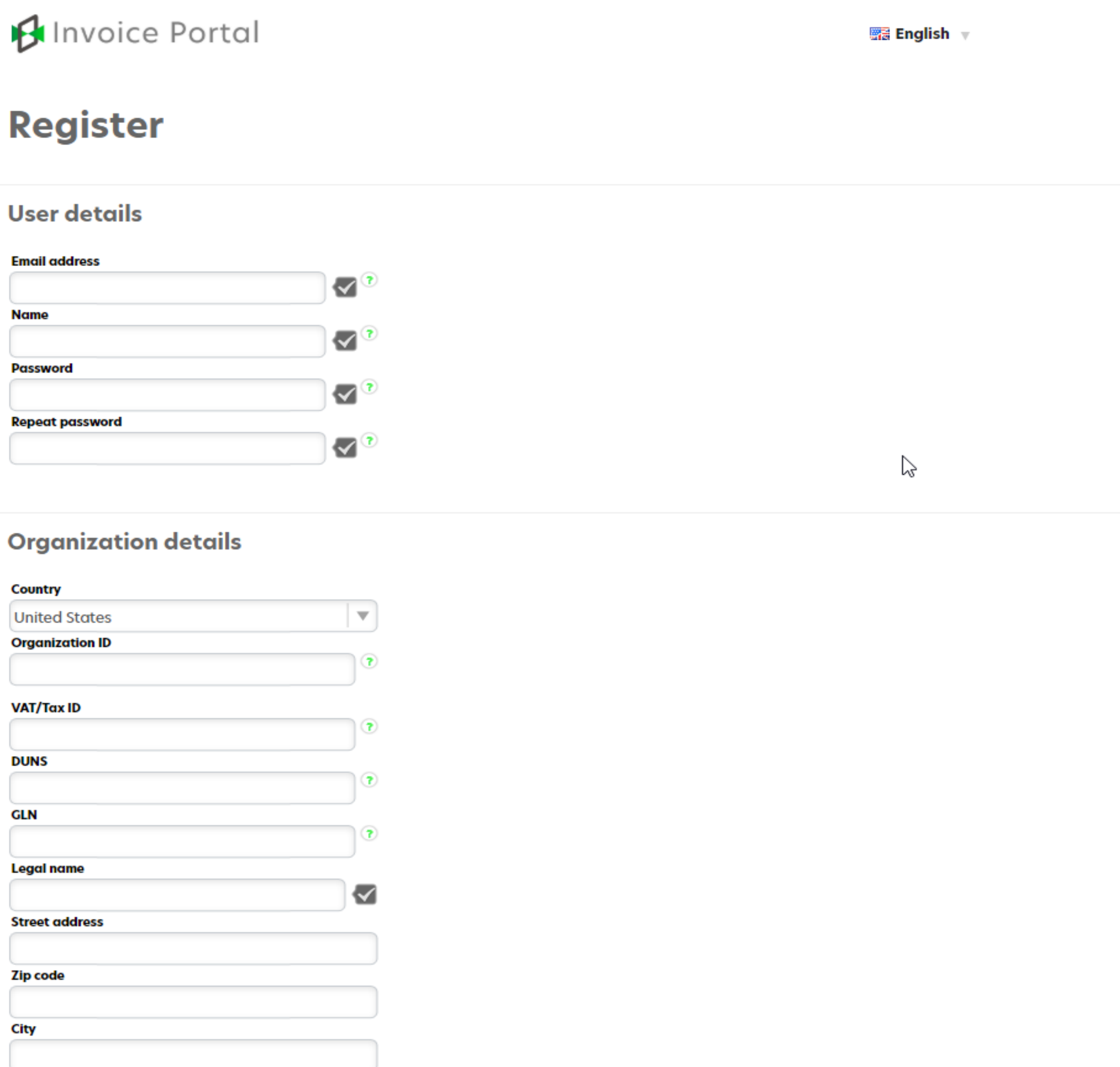
Invoice Portal

www. fakturaportalen. se

support@fakturaportalen.se

+ 46 8 446 34 00

In Order to create and send your invoice electronically you need to register your company in the Invoice portal. This is done on https://web.fakturaportalen.se/register. Once you've entered the link, it looks like this



All fields with a check mark next to it are mandatory to fill in. When you have filled in the information, the checkmark becomes green. Next To Some fields there is a question mark, clicking on the character will provide an explanation for the field.

User Information

- Email Address: Fill in the email address (the email address will then be your username)
- Name: Contact Person's name
- Password: Password with at least 6 characters

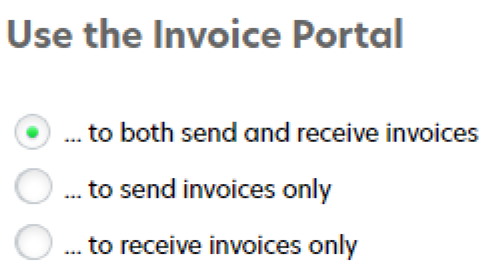
Organization Information

When you fill in the organization number, the rest of the company information is automatically downloaded.

- Country – In which country is the company registered
- Organization number - Organization number for identification of a legal entity.
- Vat/Tax ID – Vat registration number at respective countries tax authorities

Use the Invoice Portal

Here you select "... To send Invoices "



Member level

Below you can see the different member levels to choose from. If you are going to invoice up to 25 invoices or fewer each month, Membership is Completely FREE! It also includes free support at all levels. You Select the level you want under the description of the level.

Choose the level that suits your needs for outgoing invoices.

Free	Basic	Plus	Premium
✓ Up to 25 invoices per month. ✓ Send to all members ✓ Easy to send via the web ✓ Archive the current and previous calendar month ✓ Personal support: 30 USD/issue	✓ Up to 100 invoices per month. ✓ Send to members and the entire network ✓ Integration to selected systems (such as via virtual printer). Standard formats such as Svefaktura and other formats. ✓ Archive the current and preceding three calendar months ✓ Personal support: 30 USD/issue	✓ 500 invoices per month included. More Plus-packages will be added automatically as needed. ✓ Send to members and the entire network ✓ Full integration to any system can be offered ✓ Archive for current and previous calendar year ✓ Support included	✓ 5,000 invoices per month included. More Premium-packages will be added automatically as needed. ✓ Send to members and the entire network ✓ Full integration to any system can be offered ✓ Archive up to ten years ✓ Support included
0 USD/month	25 USD/month	100 USD/month	600 USD/month
Choose Free	Choose Basic	Choose Plus	Choose Premium

Finish the registration

Once you have filled in all the information and selected the member level, you can complete the registration. To do This, confirm that you accept the Terms And then click **"Done".**

Finish registration

Terms and conditions for the Invoice Portal

✓ We agree to the terms

Done

After Registration

Once you have registered, an activation email will be sent to the email address you selected at the time of registration.

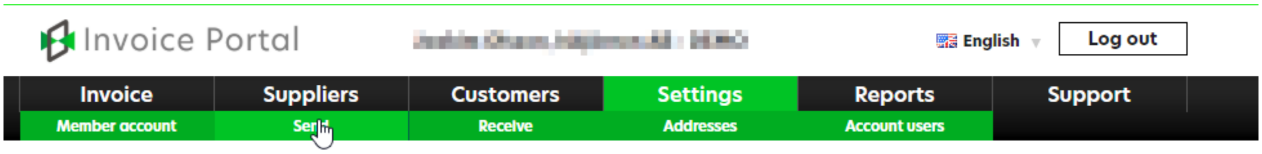
In This email you will receive a link that you click to activate your member in the Invoice portal.

When the member is activated, you can sign in with your email address and password that you have received.

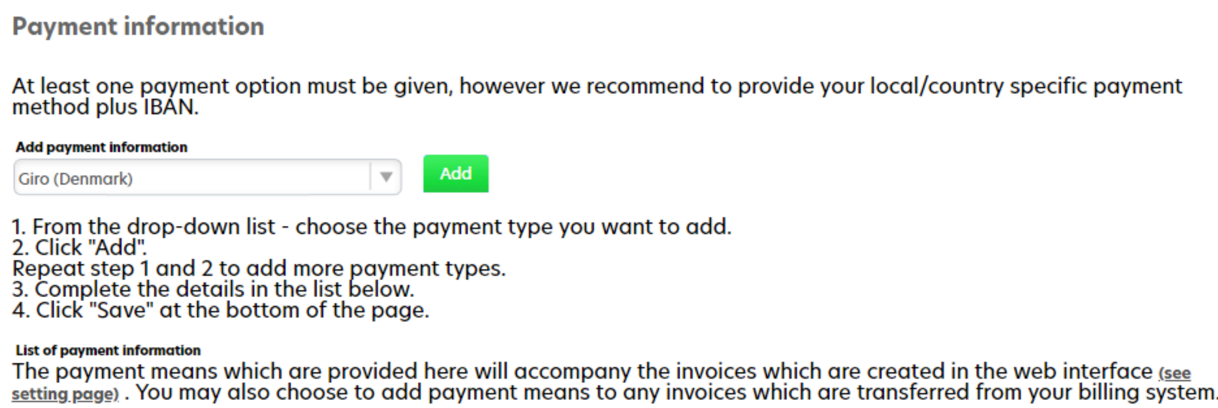
Payment Information

Before You can start invoicing, you must enter your payment information. Your payment information will be entered on your invoice. You can do This easily in your settings.

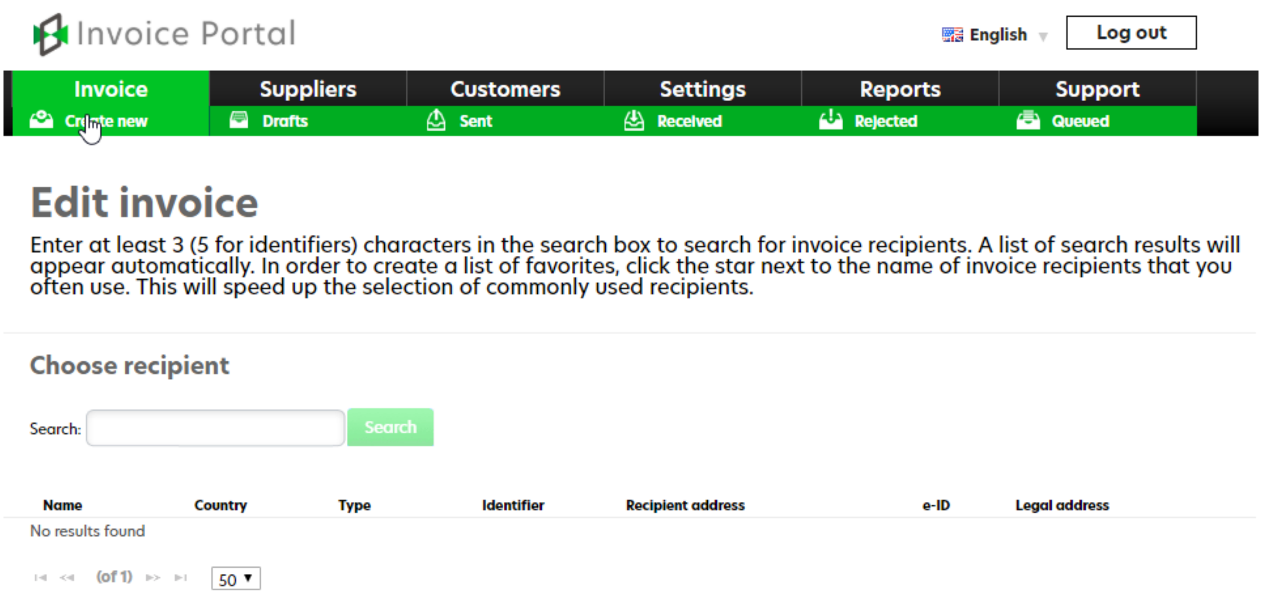
Go to **Settings > Send:**



Among These settings, there is a headline called **"Member payment Information".** This is where you add your payment information. Here It is also step by step how to do this.



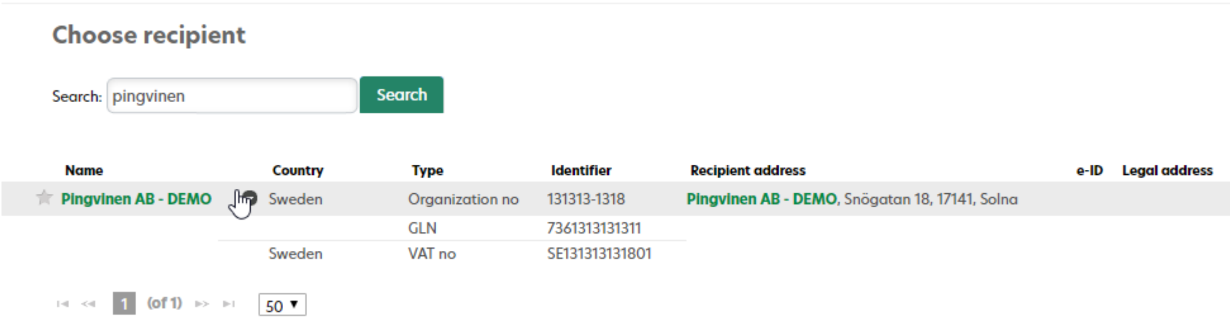
When you click **Invoice > Create New** You will get to this page:



Step 1 The Recipient

The first step in creating an invoice is to seek out the recipient in the **Search** Field. You can do This by using the search function. We recommend that you search on the recipient's organization number. Searching on the Company name also works.

Here's How it looks when you get a hit on your search:



If This is a recipient that you will invoice often, you can click in the Star icon on the far left. The receiver will then be saved. This will prevent you from having to perform a search on the next billing.

Recipients that you do not get a hit on but who can receive e-invoices

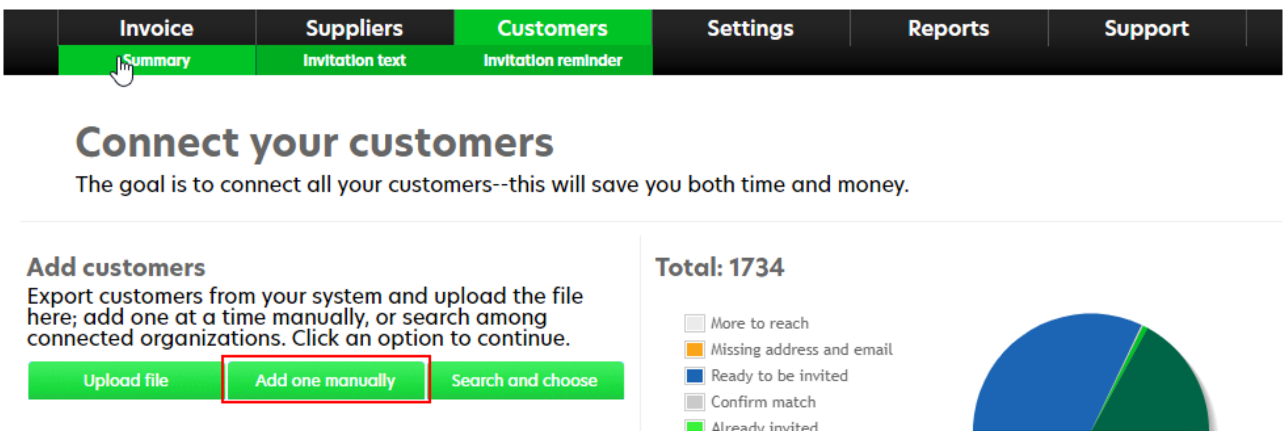
If you do not get a hit on the recipient and you know that they can receive an e-invoice, please contact us at support. Your recipient needs to be placed in a register with us. We need to know your recipient's name, corporate identity number and which VAN operator they receive from.

Many recipients choose to use a third-party operator to manage conversion between different formats, communication, security and traffic monitoring. VAN stands for Value Added Network and is an operator of B2B traffic. The Operators have interconnection agreements between each other, making the mass connection smooth.

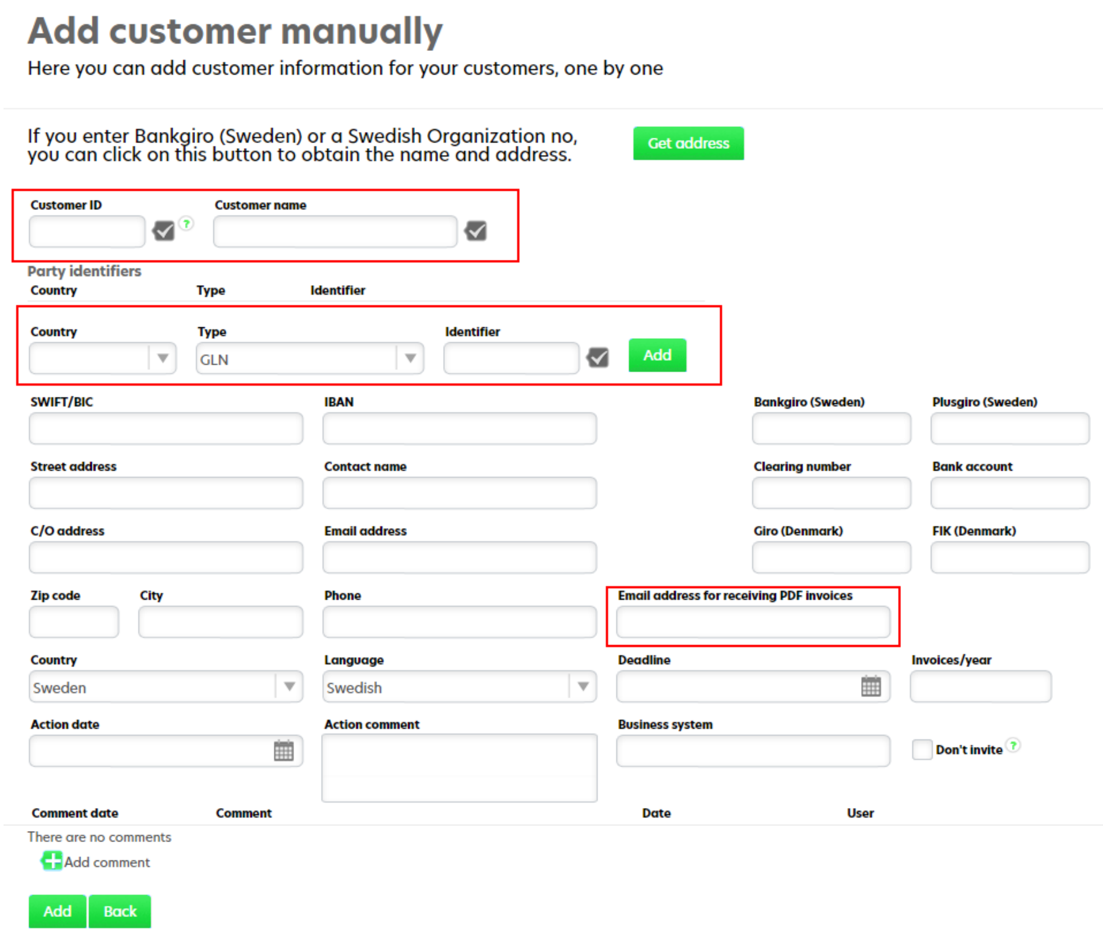
Recipients who are unable to receive e-invoices

If you have a customer who is not able to receive e-invoices but who can receive by e-mail (PDF invoice), you can still invoice the customer via the Invoice portal. In Order For These receivers to be searchable, the first step is to create a customer card For the recipient. Here's How to do it:

Go to **Customers > Summary**
Click the **ADD Manually**



This will Take you to this page:



The most important thing is to fill in the Customer number, Client name, Identifier and Email for receiving PDF invoices.

Customer ID – An internal number that identifies the customer. Must be unique to each customer.
Customer name – Name of the customer
Party Identifiers – Add the customer's corporate identity number

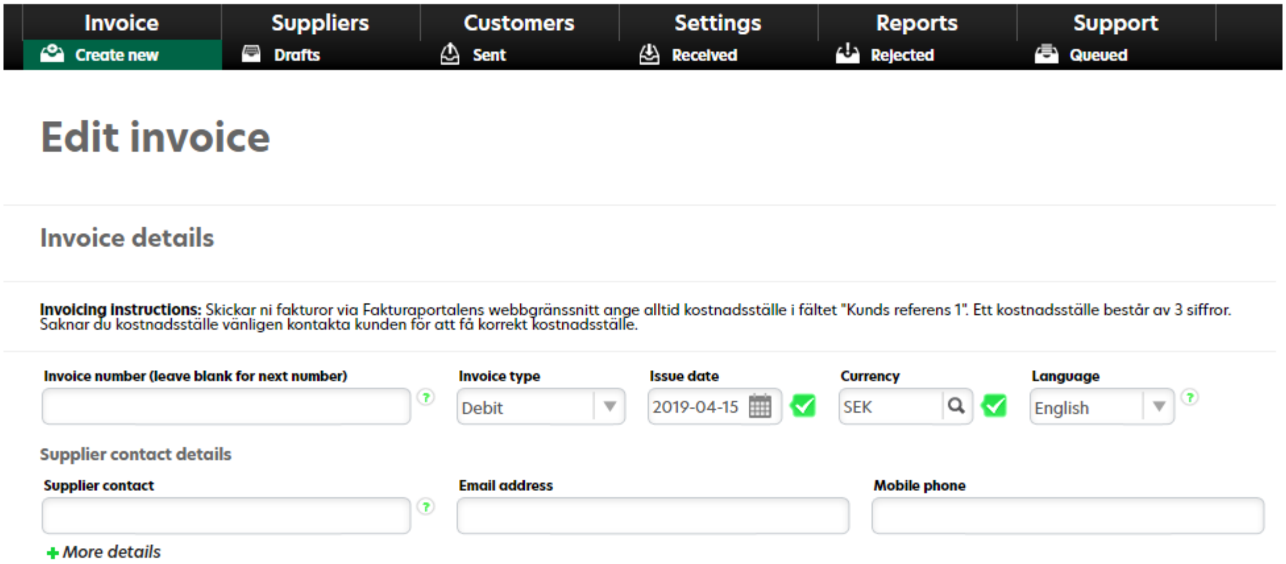
Country: Choose respective country in Drop down menu

Add Routing number with a hyphen

Email address for receiving PDF invoices – Fill in the email address that the customer wishes to receive invoices for.

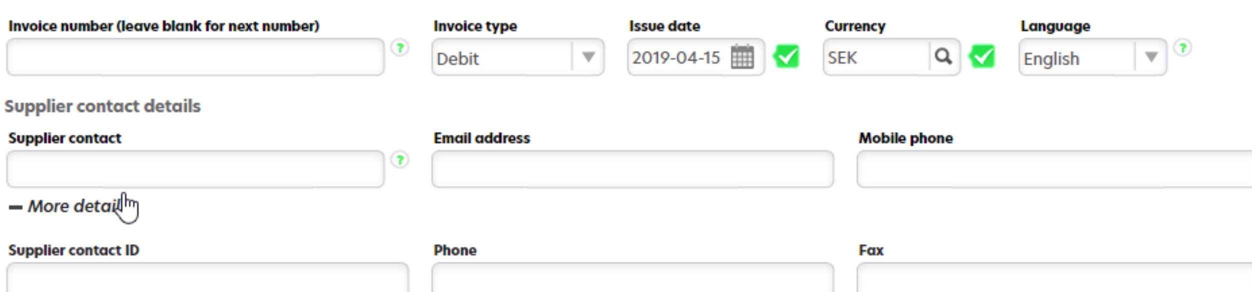
When you have filled in these fields, you can click **Add** At the bottom of the page. Now You can look up this recipient in the same way as recipients for e-invoices. So under **Invoice > Create New**. Search on the name you entered for the customer or an identifier such as organization number.

To be able to create an invoice for your recipient, click on the recipient you receive when you complete your search, then you will be taken to this page:



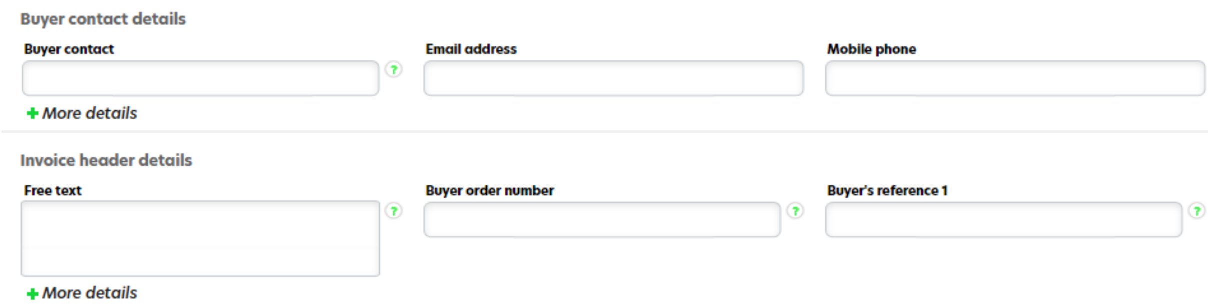
Fill in the fields that you need to enter information in. Here too are little question marks next to some fields that you can click to get an explanation.

Invoice Information and Vendor contact information



- Invoice number – Fill in your invoice number, both numbers and letters can be used
- Invoice Type – Here you enter if it is a debit or credit note
- Issue Date – Automatically Filled in when the invoice is created
- Currency – In which currency, the amounts
- Language – What language Should the fields of the invoice have
- Supplier contact – Your contact person for this invoice
- Email Address – Contact person's email address
- Mobile Phone – Contact person's mobile number

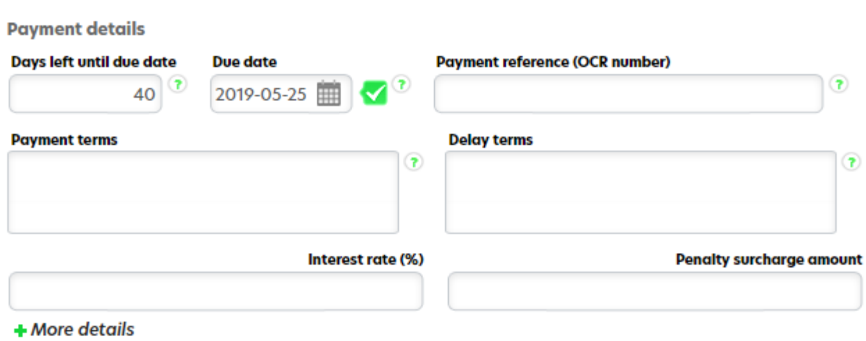
Buyer's contact information and fakturahuvud information



- Buyer contact – Your customer's contact person for this invoice
- Email Address – Contact Email address
- Mobile Phone – Contact person's mobile number

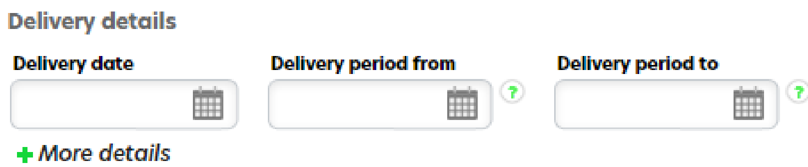
- Free Text – Here You can enter information as free text in the invoice that you want to send to the customer
- Buyer order number – Customer's order number for this invoice
- Buyer’s Reference 1 – Customer reference regarding this invoice. Some customers require, for example, that you specify a cost center, then it must be stated in this box. If a reference is required, the recipient should inform you of this.

Payment specification



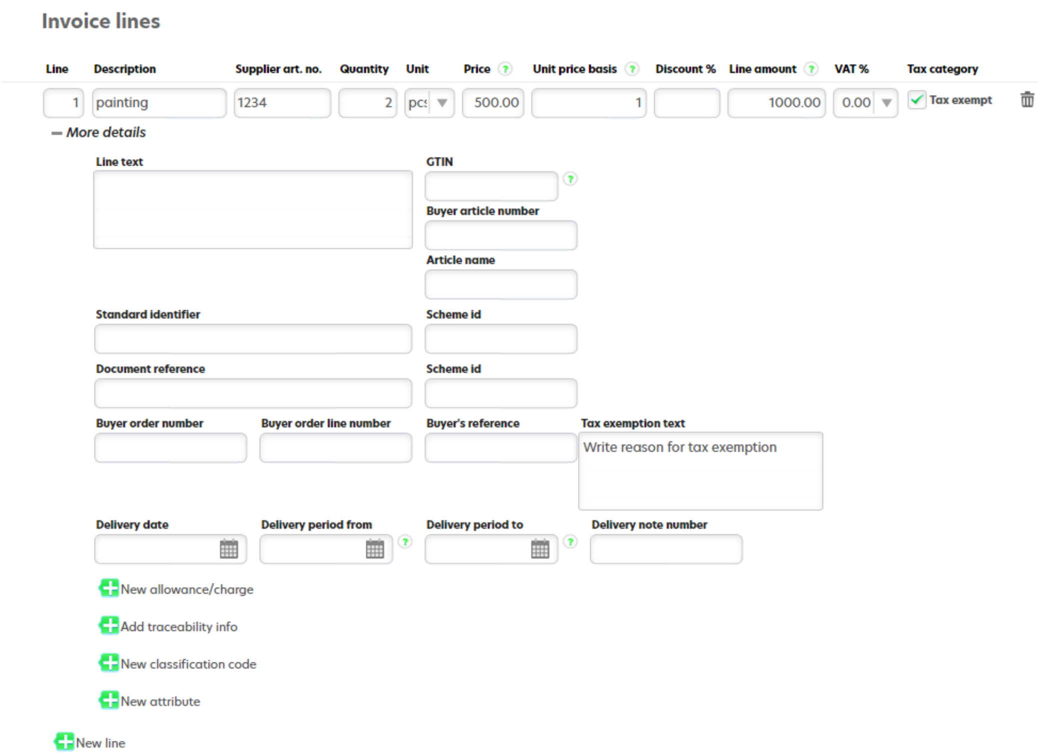
- Days left until due date – Payment must be made within the number of due dates
- Due Date – The Payment must be made at the latest on the due date. The Date is filled in automatically depending on how many due dates you specify.
- Payment Reference (OCR) – A numerical code that facilitates automatic accounting of payments
- Payment terms - Your conditions of use for this customer
- Delay terms – Your Terms In case of late payment

Delivery Information



Here you fill in the delivery information. If you click **"More Details"** You can also fill in the shipping address and carrier.

Invoice lines



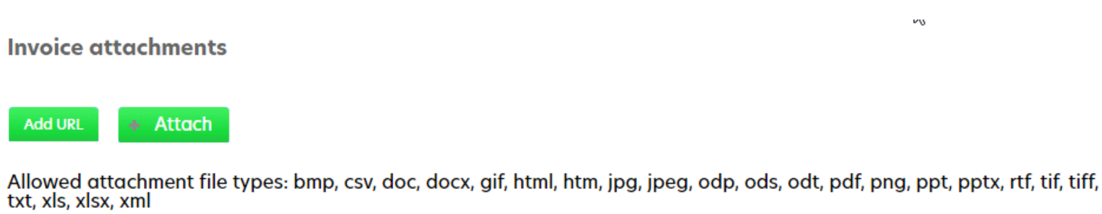
Above you will find an example of how an Invoice line might look like.

- Line – The Line number of the invoice line is automatically assigned as a sequential number
- Description – The Item that you are invoicing
- Supplier Art.no – Item number of the product/service
- Quantity – Quantity
- Unit – For example, if it is an object you invoice, you choose "Pcs". Should you invoice for a service, you can use the number of hours.
- Price – Price in your chosen currency

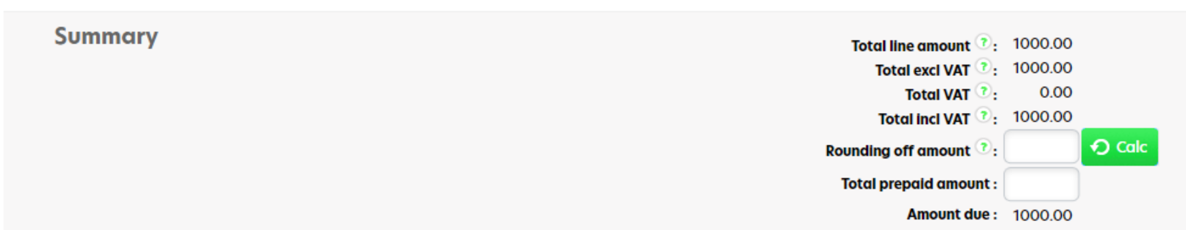
- Unit Price Base – The Quantity the price is based on
- Discount% – If there would be a discount on the item, it is listed here. However, This only works as a ledger for the rebate. Therefore, you need to deduct the amount on the invoice line itself. If it is a 50% discount and the painting really cost 1000 kr you have to indicate that the price is 500 kr.
- Line Amount – The Invoice portal calculates this using the Quantity * Price
- Vat – Which VAT that is applicable on the line. If the VAT is 0% then you have to check "Tax exemption"
- Tax exemption text – If you have checked the " Tax exemption" then you must also indicate the reason for this. A short sentence is Enough.

If you are going to bill for several different articles You can add more lines by clicking **"New line".**

Invoice Attachments



Here you can attach attachments. Such as. A packing slip.



At the Bottom of the page, the invoice is automatically summed. Here you can also calculate penny rounding by clicking **Calculate** Button.

Almost done!

During The summation you will find these buttons.

- Save – If You don't want to send the invoice at once, you can save it. Then it ends up in Drafts. You can find your draft under **Invoice > Draft**. You can at a later time access the invoice again and send it.

- Check – If You click this button, the Invoice portal verifies that you have filled in the required fields.
- PDF-By Clicking the PDF button, you save the invoice as a PDF file. This allows you to preview the invoice before sending it.
- Send – Click This button to send the invoice to the recipient
- Cancel – If You do not want to save or send the invoice, click **"Cancel".** Then Delete the invoice.

Done!

After you click **Send** Is the invoice sent! If you have any questions or problems, you can always contact support! Contact details can be found on the cover page.

Archive

During **Invoice > Sent** You will find your archive. Here you can see all invoices and attachments you have sent.

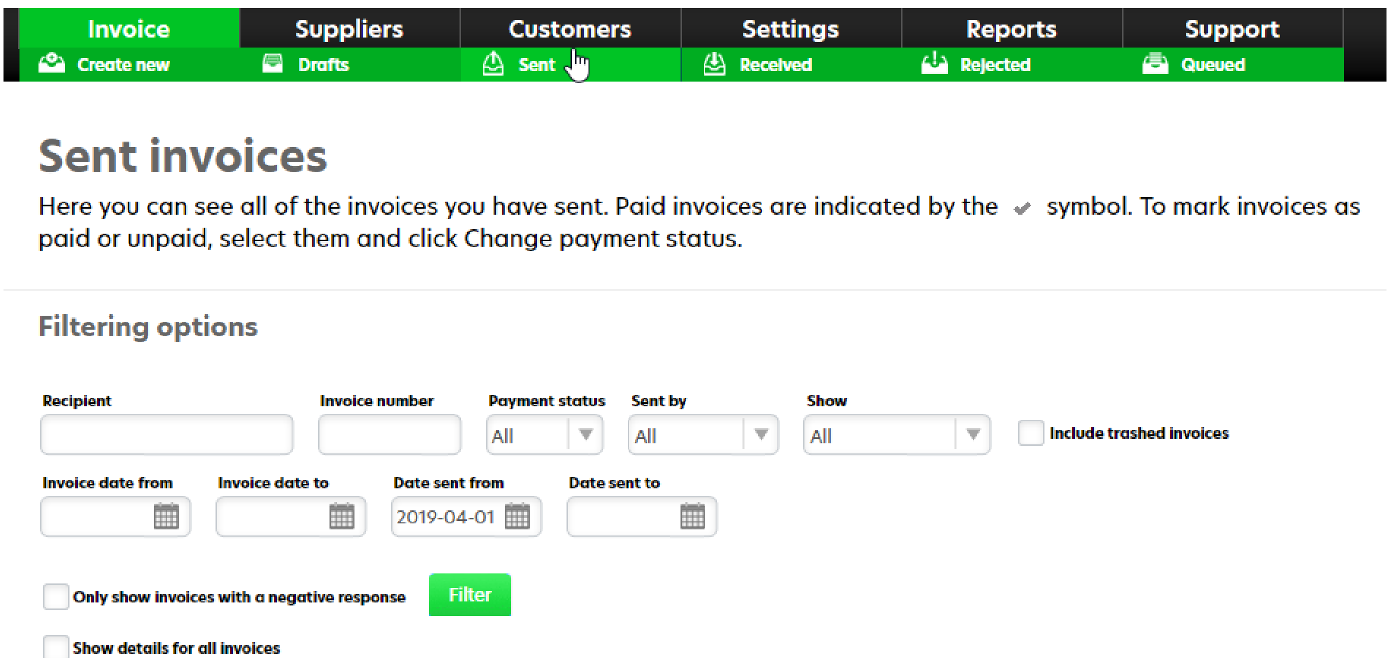
A Free-member has access to see invoices sent from the previous calendar month and the current calendar month. However, you can save the invoice as a PDF file and store it on your computer.

If you need the ability to look even further back in your archive, you can update your member level. With member Level Basic you can look back 3 months in time and with Premium you can see 10 years back.

It is only the legal invoice that we save. We save it as long as the archiving law indicates that you should save, which is currently for 7 years.

Find an old invoice

The archive contains filter settings to help you find a specific invoice.



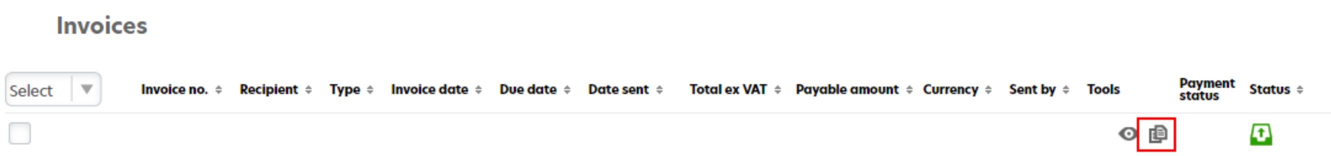
For example, If you want to see all the invoices you have sent to the "Polar Bear", enter the name of the company in **Receiver** Field. Then Change the **Date sent from** Field. If you want to see all the invoices you have ever sent to the recipient, you can leave the Date field blank.

If you are looking for a specific invoice, you can search the invoice number in the **Invoice number** field.

Copy an invoice

A practical feature of the archive is that you can copy an old invoice. The Following is a description of how to proceed.

1. Go to the archive. (**Invoice > Sent**)
2. You can use the search function to search for the invoice you want to copy.
3. Click the **Copy** The tool (see figure below).
4. Correct any changes, Such as. Invoice number, delivery date, and invoice lines, etc.
5. Click **Send**.



When you copy an invoice, you can change all the information except **Receiver**.