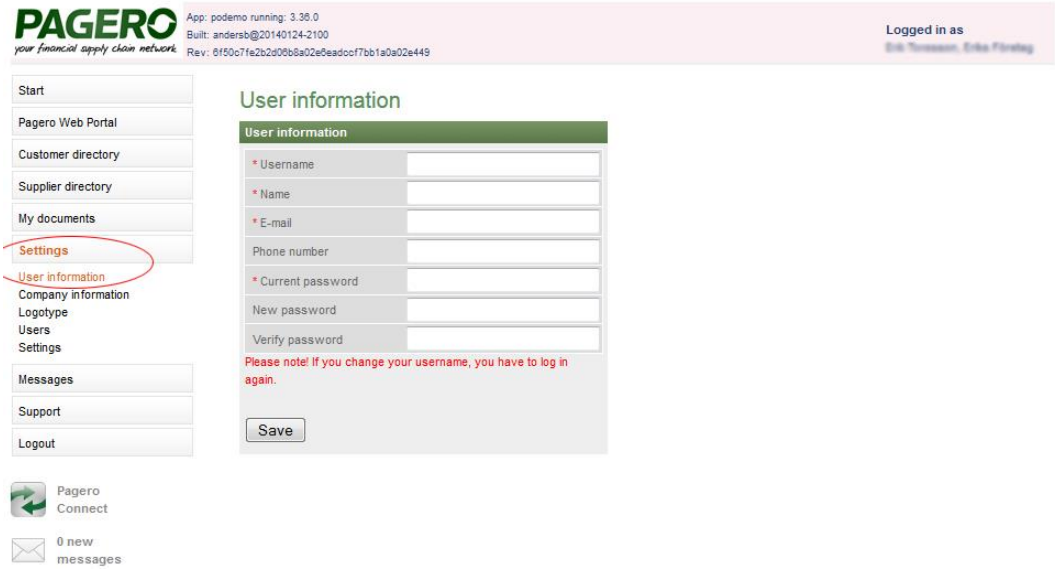
PAGERO
your financial supply chain network

Users' guide

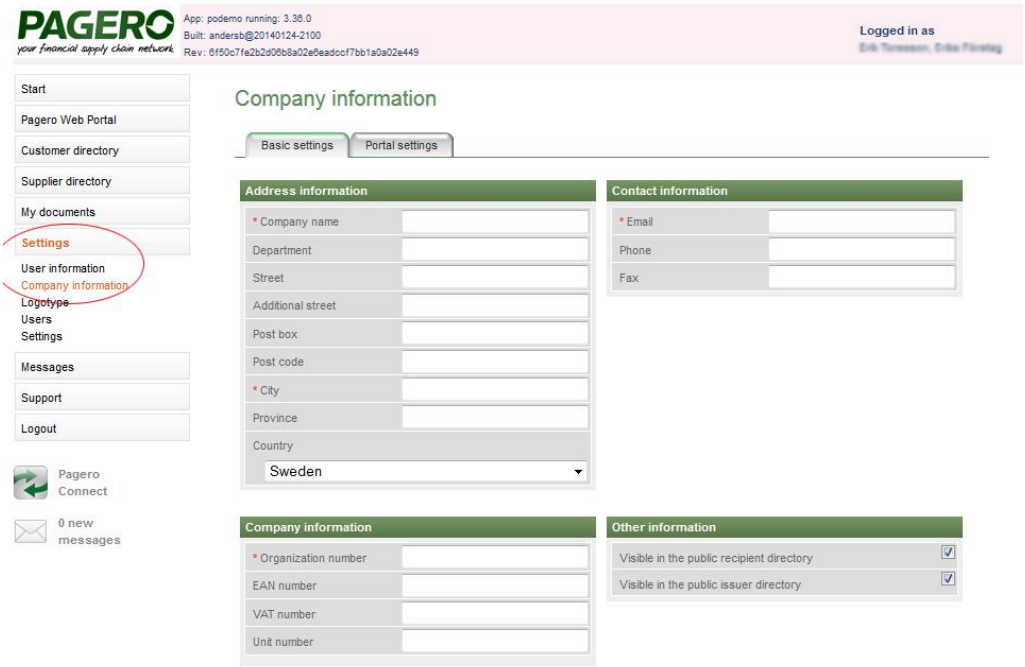
Pagero Web Portal

Activate your Pagero Online account

1. Once your company has been registered, an e-mail will be sent to you containing a link to activate your account in Pagero Online.
2. Click the link in the activation e-mail. Once you have reviewed and approved the agreement, choose a password and go to Pagero Online, either by clicking **Continue to Pagero Online** or by entering www.pageroonline.com in your browser.
3. Log in to ***Pagero Online***. Go to **Settings** – **User Information** to change your password.



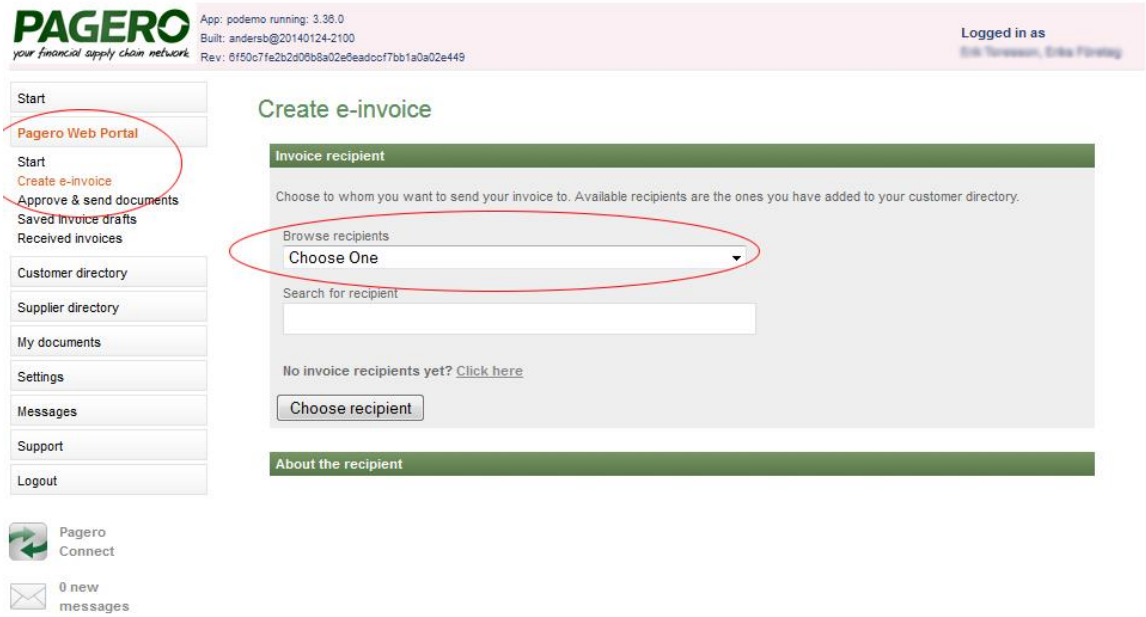
4. Go to **Settings** – **Company information** to complete your company information.



Create and send invoices

According to generally accepted accounting praxis, you should attach the original invoice to the created e-invoice that you send with Pagero Web Portal.

1. Go to **Web Portal** – **Create e-invoice**. Choose the recipient in the drop down menu where detailed information is displayed. Click **Choose recipient**.



2. Create a new invoice by filling out the fields in the invoice form. Start by choosing Credit or Debit note. Mandatory fields are marked with a red border.

Debit

Invoice No. | Customer id | Invoice date 29/01/14

Deliveree address

Name
Department
Postbox
Street
Additional street
Post code
Town
Province
Country: Choose ccu

Invoice address

Name
Department
Postbox
Street
Additional street
Post code
Town: Göteborg
Province
Country: Sweden

Contact person
Your supplier id
Your order No.
Your reference
Your org. id.
Your vat No.
Delivery date
Order date

Delivery terms

Delivery method

Our reference
Our order date
Due date
Overdue fine
OCR
Payment terms

Select all Deselect all

Edit	Artnr	Name	Qty	Unit	Unit price	Discount	Vat rate (%)	Vat amount	Net	Total		

Message to the recipient

Currency: SEK
Vat currency: None
Round to nearest integer

Row summary
Vat amount
Net amount
Rounding amount
Total

Discounts and charges

Edit	Type	Net amount	Vat rate (%)	Free text

Vat specification

Edit	Vat code	Vat rate (%)	Net amount	Vat amount

- 'Name' is required in an address
- 'Post code' is required in an address
- 'Town' is required in an address

Address

Name
Department
Postbox
Street
Additional street
Post code
Town
Province
Country: Choose ccu

Phone | Fax | PlusGiro | BankGiro

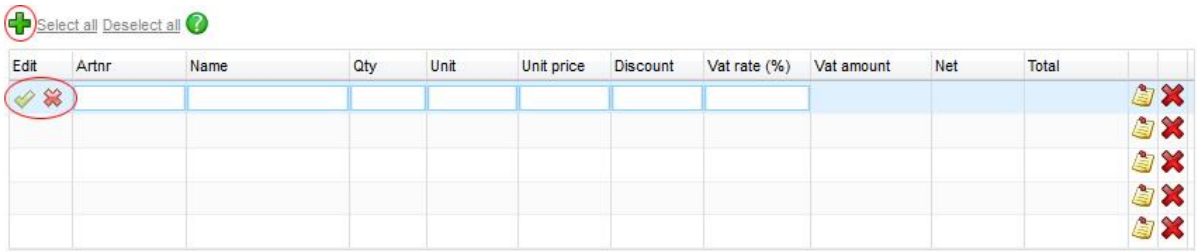
E-mail | Internet | IBAN

Headquarters | Bankaccount

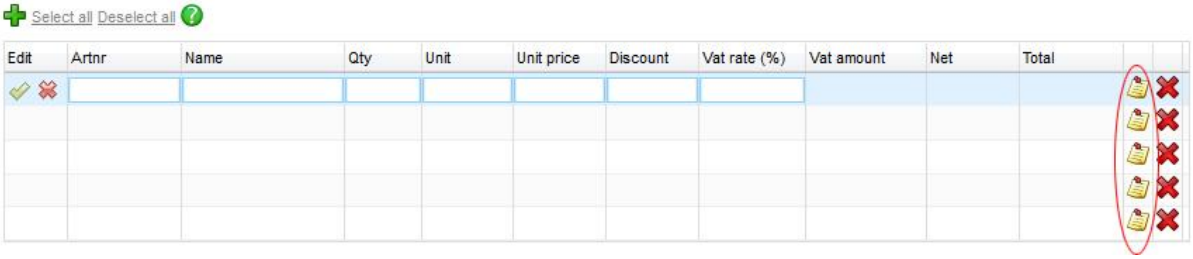
Vat. No. | Org. No. | BIC/SWIFT | Branch code

Save as draft | Proceed with the invoice

3. Click the **plus symbol** above the row section to add more rows. Click the **green check mark** when you've filled out the information in the invoice row to save it. To edit a row, click the empty field under **Edit**.

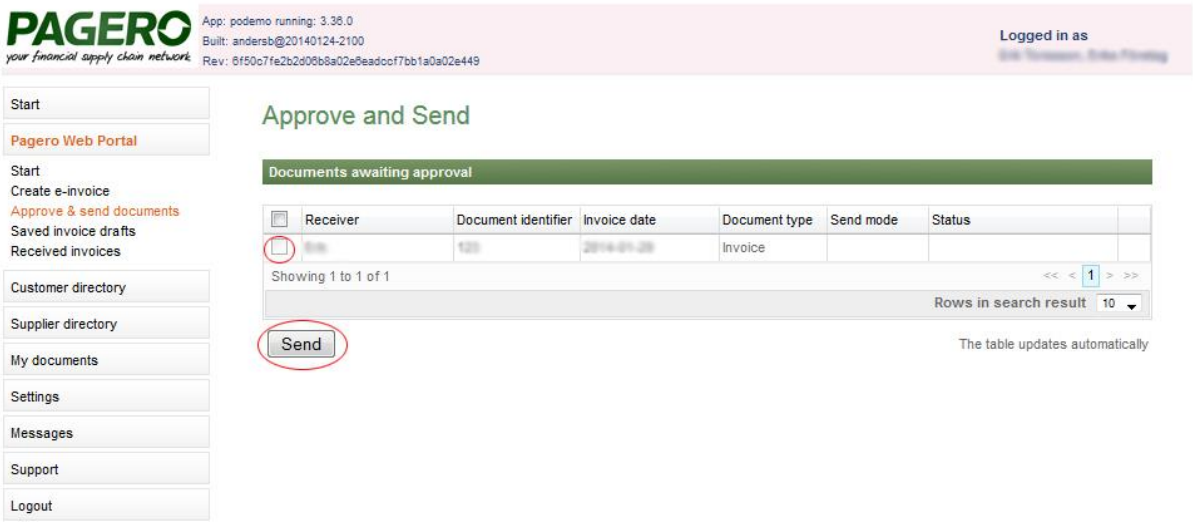


4. You can also add invoice row specifications to any of the invoice rows by clicking the icon to the right that looks like a pinned note.

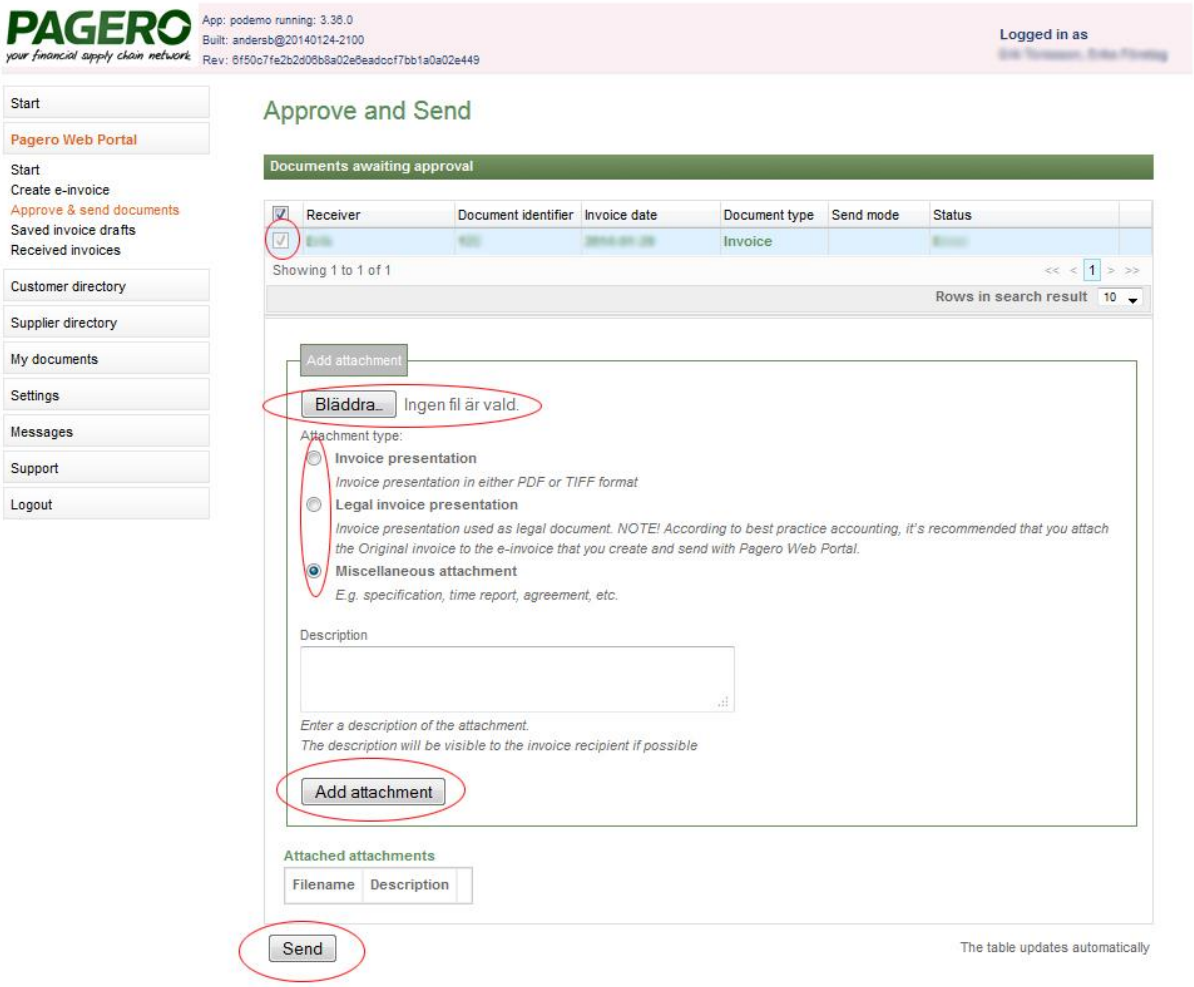


5. Make sure that all the information is correct and that you have registered the correct VAT-amounts. Click **Proceed with the invoice** to proceed.

6. The dialog box **Approve & send** will appear. Click the invoice in the list to see detailed information. Check the box to left of the invoice to approve. Click **Send** to send the e-invoice to your customer.



7. If you want to add an attachment to your invoice, highlight the invoice and click **Select file**. Browse the file you want to attach and enter what kind of attachment it is. Finish by clicking **Addattachment** at the bottom.

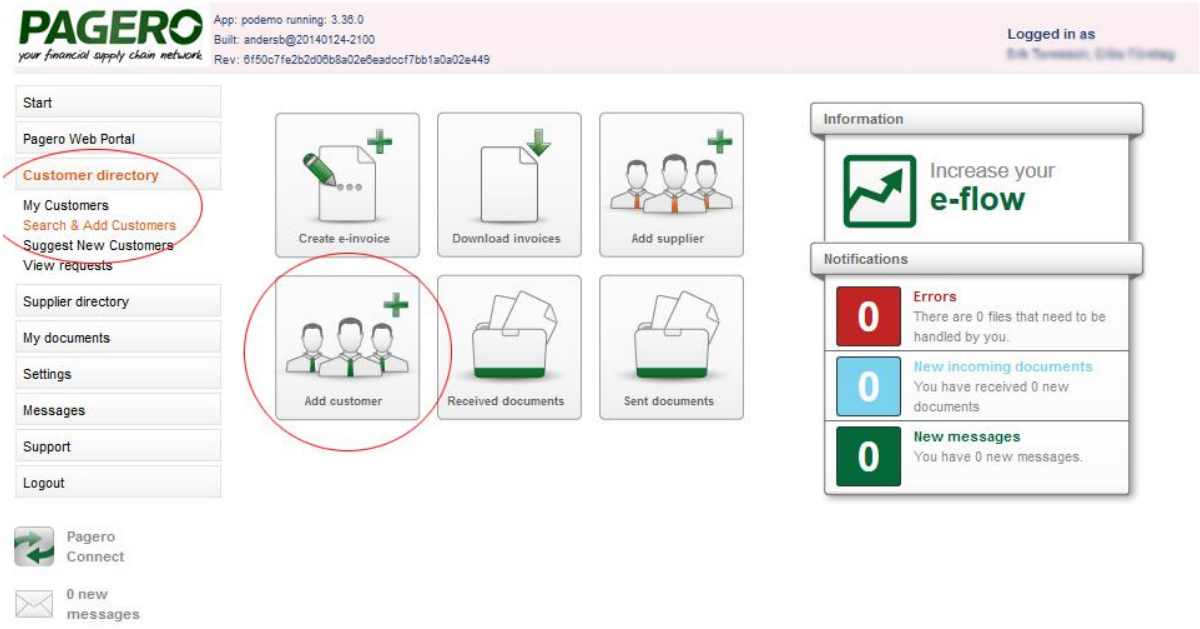


Save as draft

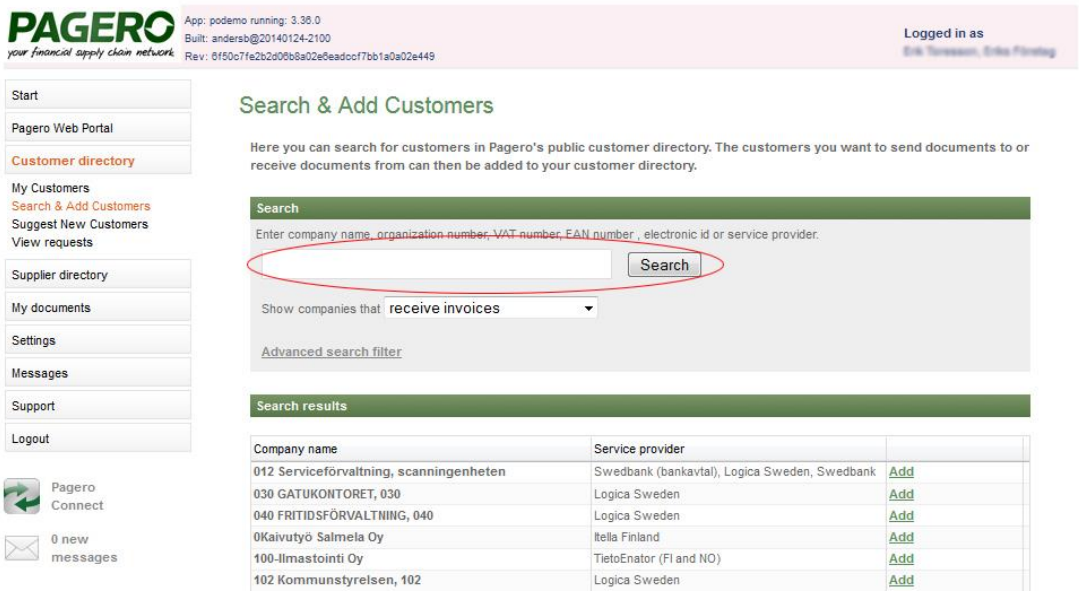
If you want to save the invoice as a template for later invoices, click Save as draft instead of Proceed with the invoice when you have finished filling out all the fields in the invoice. You can access it at all times by clicking **Saved invoice drafts**.

Add a new recipient to your customer directory

1. Either click **Customer directory – Search & add customers** in the menu to the left, **or** click the shortcut **Add customer** on the start page.

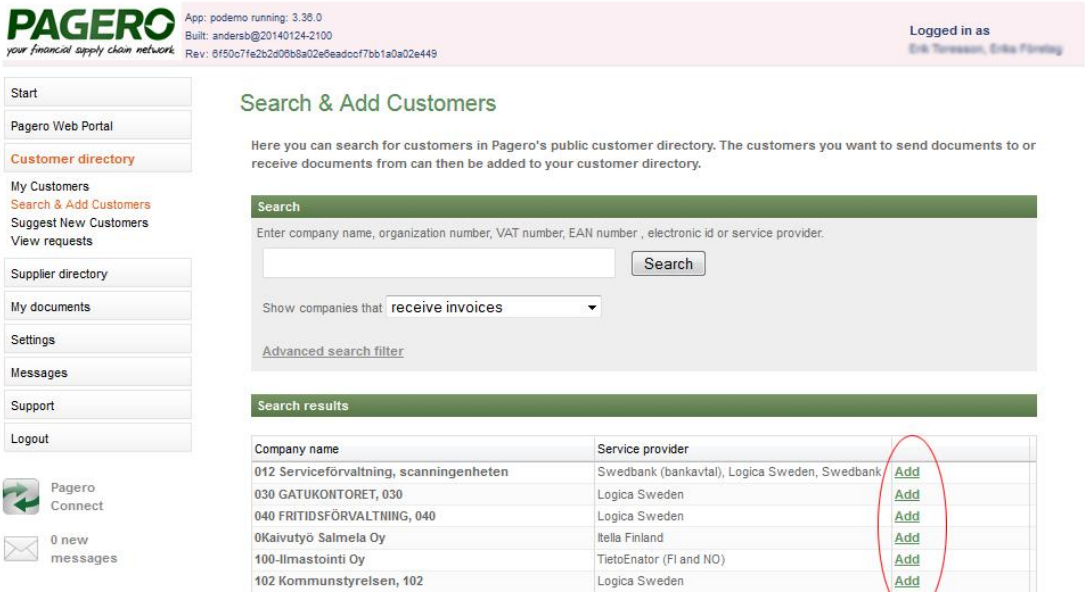


2. In the search field, search for the recipient by writing the company name, corporate identification number, VAT registration number or EAN code. You can expand the search criteria by checking off in the additional information box that you want to search using **Advanced search filter**.



If you are uncertain whether the company or organization in the search result is the recipient that you want to add, click the name in the list to get detailed information.

3. When you have found the recipient you are looking for, click **Add** to add the recipient to your customer directory.

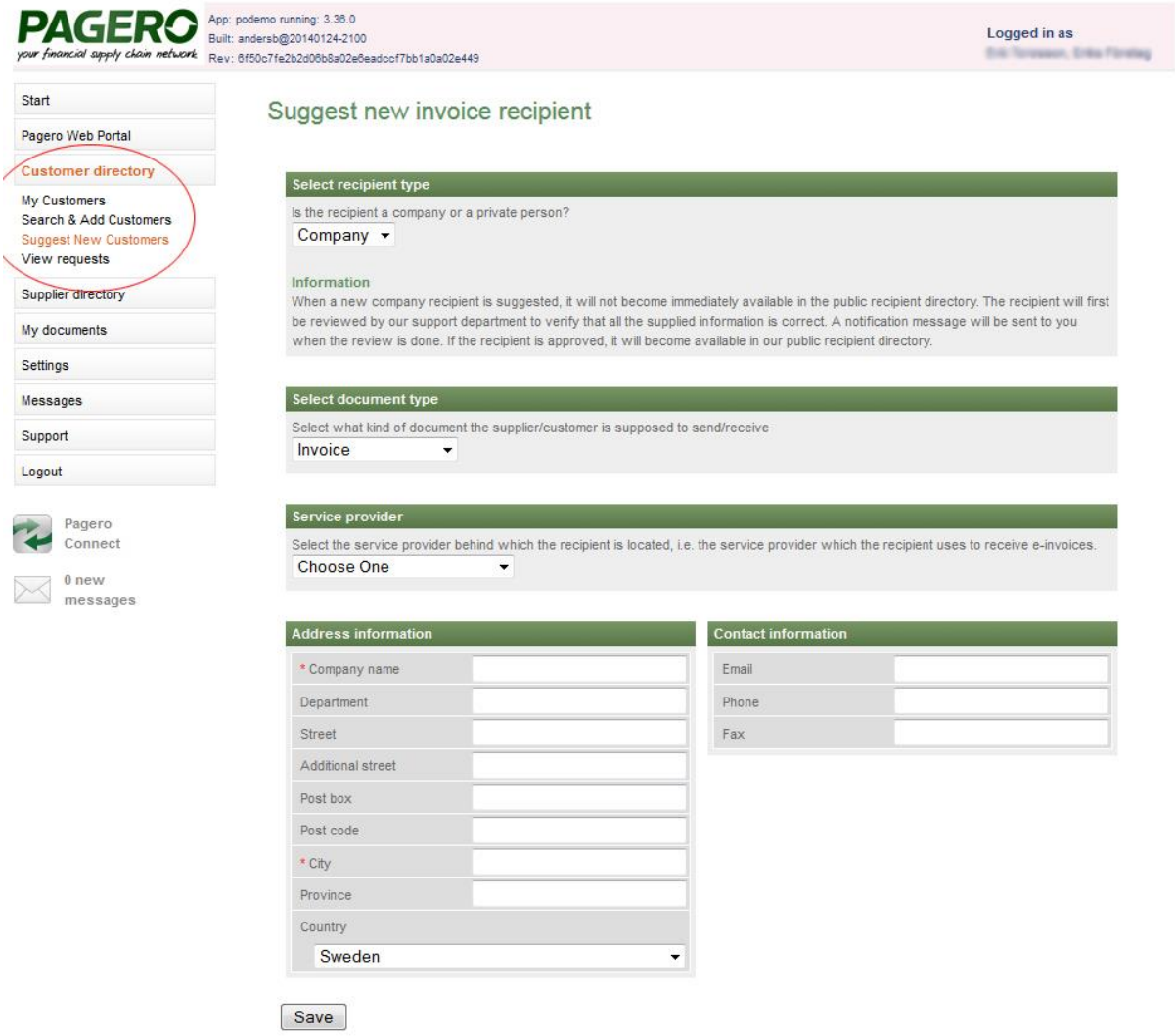


You will receive a message in Pagero Online when the recipient is ready to receive e-invoices. The message includes a confirmation and possibly a personal message from the recipient. You can see the status of your added recipients at any time from your customer directory in Pagero Online.

Suggest new recipients that are not in Pagero's public recipient directory

One reason for not finding a customer in the public recipient directory that you wish to add to your customer directory is that the specific customer has selected to be hidden to other users. But it can also be due to the fact that Pagero doesn't know that your customer can receive e-invoices.

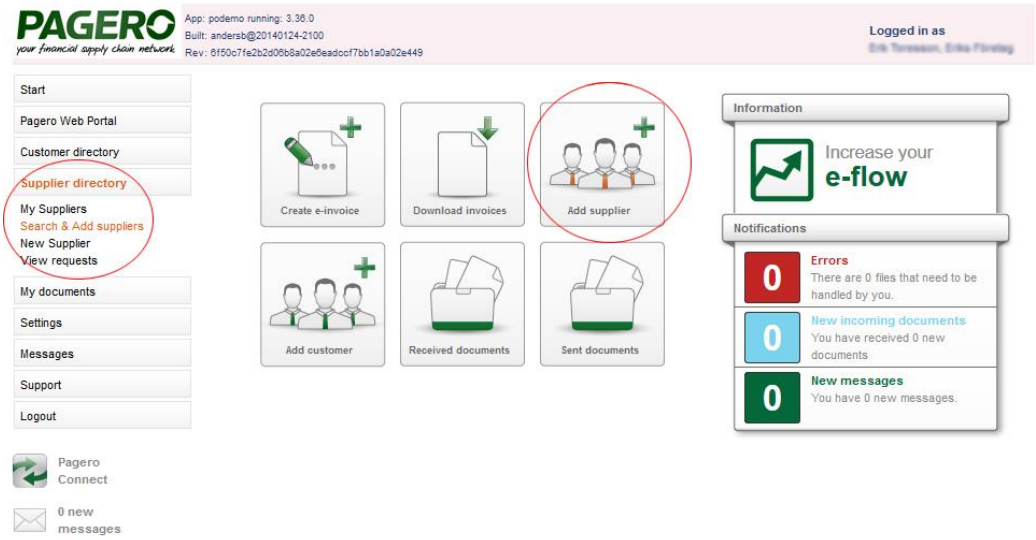
In **Customer directory** – **Suggest new recipient** you can fill in the information that's needed in order for Pagero to be able to help you or investigate how and if it's possible to send e-invoices to this recipient.



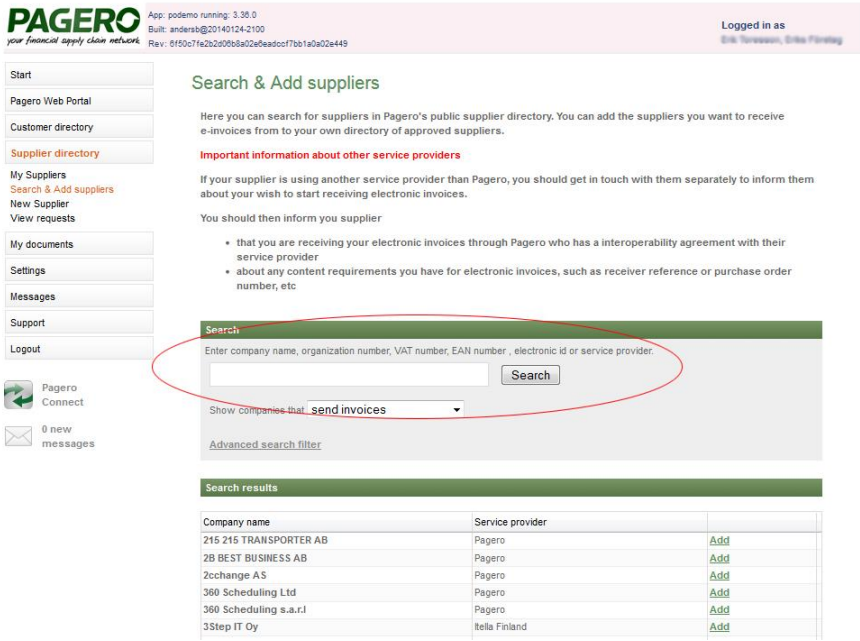
Add a new supplier

For a supplier to be able to send e-invoices to you as a customer, it is required that they add you in their customer directory, in Pagero Online. All organizations and companies that can receive electronic invoices via Pagero, are searchable in Pagero's public supplier directory. Exceptions are those recipients who have chosen not to publish themselves as recipients in Pagero Online.

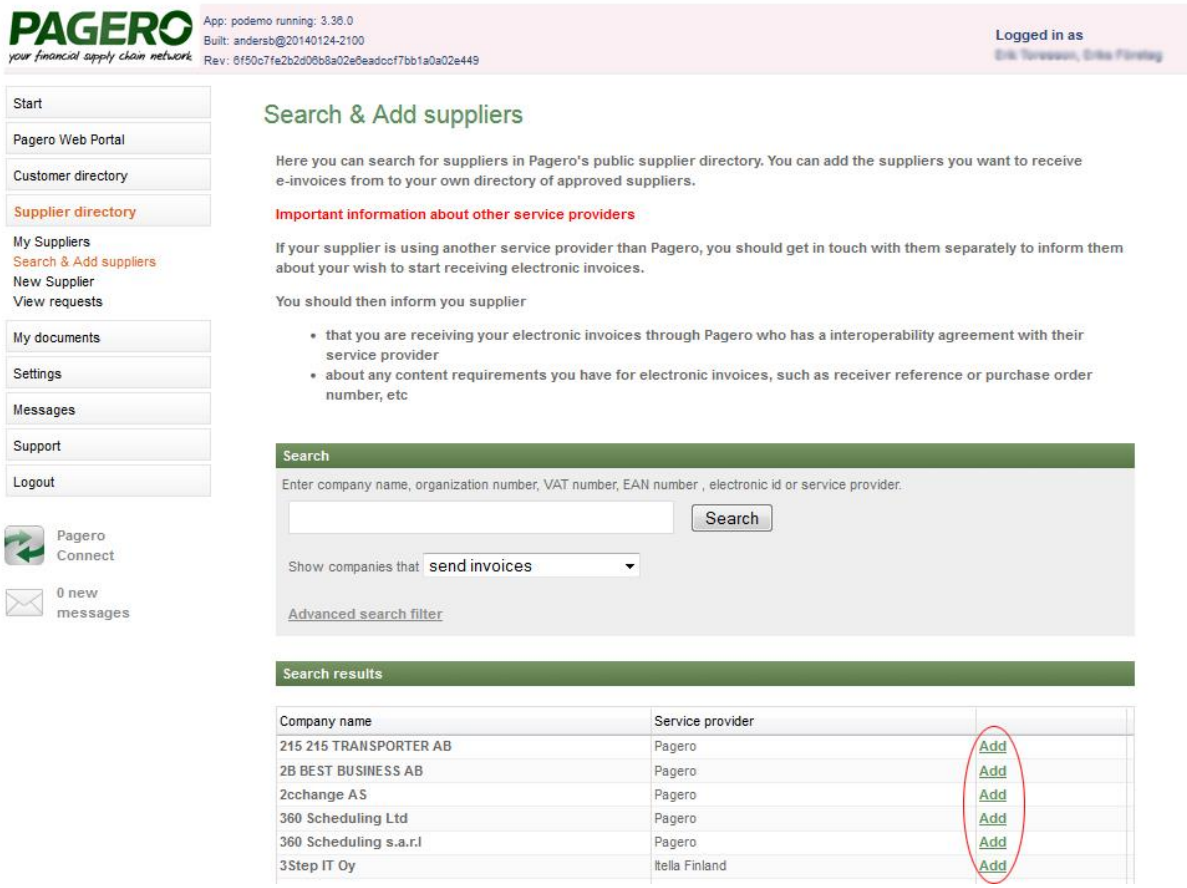
1. Either click on the **Supplier Directory – Search & Add suppliers**, in the left meny, or the shortcut**Add supplier.**



2. Use the search field, to locate the company you want to add. You can search by company name, corporate identification number, VAT registration number or EAN code.



3. Click **Add**, to the right of the supplier. A request is sent to the supplier. In the request, you can also include a personal message.



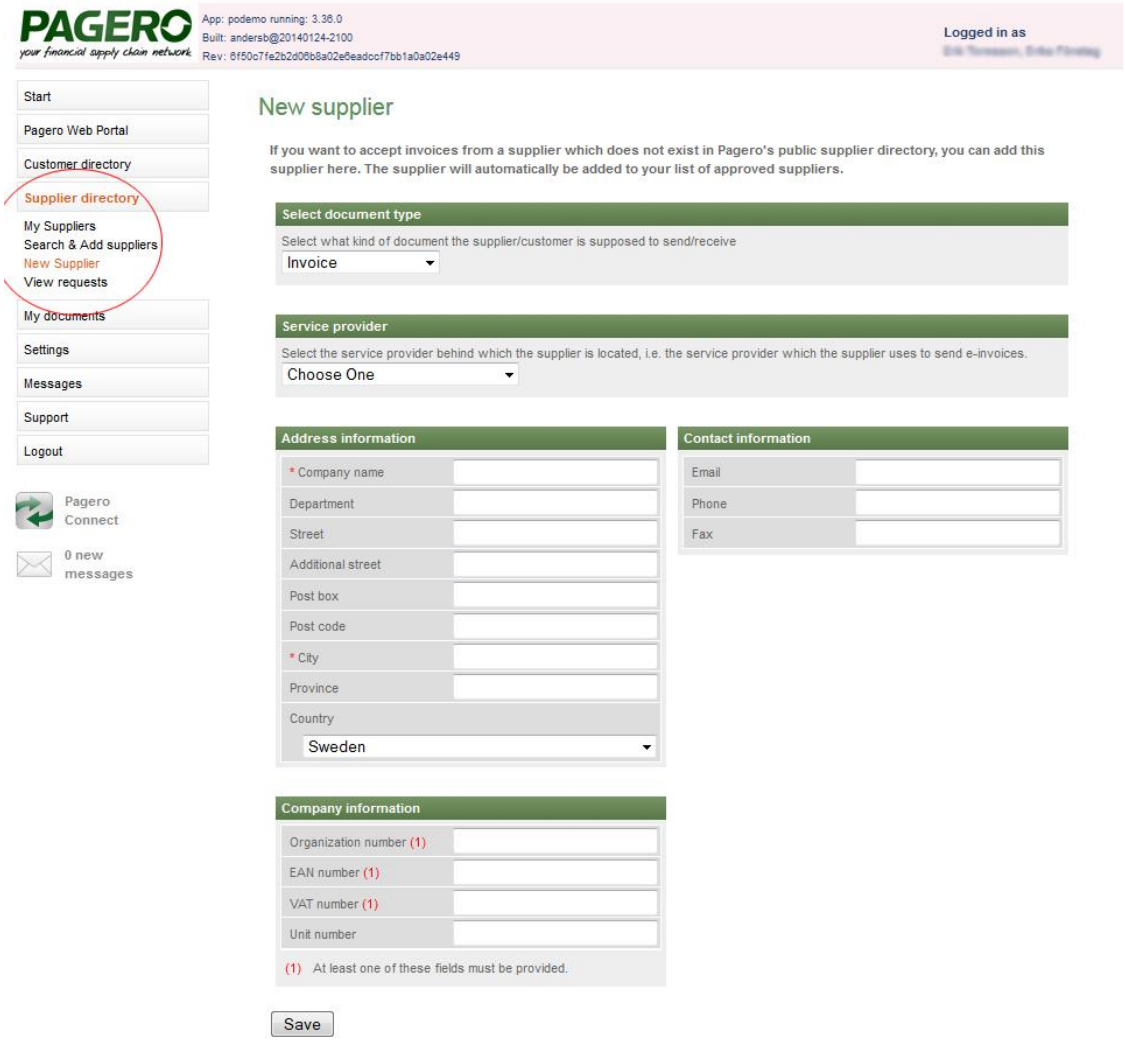
4. Supplier responds to your request, and can thereafter add you to their customer directory. After this, they can start sending you electronic invoices. Please note, that it is not mandatory for the supplier to respond to your request.

5. The supplier will be added to your supplier directory, as an “approved supplier.”

Add a new supplier that's not in Pagero's public supplier directory

By manually approving a supplier, the supplier is added to your directory "approved suppliers", which means that the supplier will be able to send e-invoices to you without having to send an inquiry to you in advance.

1. Go to **Supplier directory** – **New supplier**
2. Fill out the fields. Fields marked with a "*" are obligatory. If there's a "1" by a field it means that you must state at least one value.



3. Click **Save** when you're done.
4. The supplier you have submitted will now be an "approved" supplier in your directory of approved suppliers.

Any questions?

Please contact Pagero Service & Support Center

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info@pagero.com