Get started with the Invoice portal!

Invoice Portal

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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 "

**Use the Invoice Portal**

- ○ ... to both send and receive invoices
- ○ ... to send invoices only
- ○ ... to receive invoices only

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.
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".

### 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.

Payment information

At least one payment option must be given, however we recommend to provide your local/country specific payment method plus IBAN.

1. From the drop-down list - choose the payment type you want to add.
2. Click "Add".
3. Repeat step 1 and 2 to add more payment types.
4. Complete the details in the list below.
5. Click "Save" at the bottom of the page.

List of payment information

The payment means which are provided here will accompany the invoices which are created in the web interface. You may also choose to add payment means to any invoices which are transferred from your billing system.

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

Edit invoice

Enter at least 3 (5 for identifiers) characters in the search box to search for invoice recipients. A list of search results will appear automatically. In order to create a list of favorites, click the star next to the name of invoice recipients that you often use. This will speed up the selection of commonly used recipients.
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

Connect your customers
The goal is to connect all your customers—this will save you both time and money.

Add customers
Export customers from your system and upload the file here; add one at a time manually, or search among connected organizations. Click an option to continue.

This will Take you to this page:
Add customer manually

Here you can add customer information for your customers, one by one.

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.

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

**Edit invoice**

**Invoice details**

*Invoice instructions*: Skicka en faktura via Fakturaportalens webbplats och ange alltid kostnadsställe i fältet "Kunds referens". Ett kostnadsställe består av 3 siffror. Sökning av kostnadsställe vanliga kontaktar kunden för att få korrekt kostnadsställe.

- **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

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** 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**.