



Kofax Invoice Portal Administrator's Guide

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Preface

The *Kofax Invoice Portal Administrator's Guide* describes how to administer the Kofax Invoice Portal system. This guide contains essential information about configuring and maintaining the Kofax Invoice Portal solution and member users.

To access the settings described in this guide, you must be logged in as a Kofax Invoice Portal member administrator. Kofax Invoice Portal member administrator is a user with the extended set of configuration options. A member administrator has advanced menu options to send or receive invoices and to configure extra settings for all member accounts including their own. If more settings are required for your account or your member accounts, contact Support.

Related documentation

The documentation set for Kofax Invoice Portal is available online:

<https://docshield.kofax.com/Portal/Products/InvoicePortal/InvoicePortal.htm>

In addition to this guide, the documentation set includes the following items:

Kofax Invoice Portal Features Guide

Gives a high-level product overview with descriptions of key features and functionality. This information can help you decide which features are best suited to meet the unique challenges faced by your organization.

Kofax Invoice Portal Help

Offers detailed online assistance for both Kofax Invoice Portal member administrators and users. The help system describes how to use the product.

Kofax Invoice Portal API documentation

Provides the instruction on how to open up the application data and functionality to other Kofax Invoice Portal products, external third-party developers, and business partners.


System requirements

Specification	Description
Browser	Kofax Invoice Portal supports latest versions of the following browsers: <ul style="list-style-type: none">• Google Chrome• Microsoft Edge• Mozilla Firefox• Microsoft IE 11
Supported languages	<ul style="list-style-type: none">• Danish• English• French• German• Norwegian• Swedish

Getting help with Kofax products

The [Kofax Knowledge Base](#) repository contains articles that are updated on a regular basis to keep you informed about Kofax products. We encourage you to use the Knowledge Base to obtain answers to your product questions.

To access the Kofax Knowledge Base, go to the Kofax [website](#) and select **Support** on the home page.

 The Kofax Knowledge Base is optimized for use with Google Chrome, Mozilla Firefox or Microsoft Edge.

The Kofax Knowledge Base provides:

- Powerful search capabilities to help you quickly locate the information you need.
Type your search terms or phrase into the **Search** box, and then click the search icon.
- Product information, configuration details and documentation, including release news.
Scroll through the Kofax Knowledge Base home page to locate a product family. Then click a product family name to view a list of related articles. Please note that some product families require a valid Kofax Portal login to view related articles.
- Access to the Kofax Customer Portal (for eligible customers).
Click the **Customer Support** link at the top of the page, and then click **Log in to the Customer Portal**.
- Access to the Kofax Partner Portal (for eligible partners).
Click the **Partner Support** link at the top of the page, and then click **Log in to the Partner Portal**.

- Access to Kofax support commitments, lifecycle policies, electronic fulfillment details, and self-service tools.
Scroll to the **General Support** section, click **Support Details**, and then select the appropriate tab.

Chapter 1

Before you start

Kofax Invoice Portal is an online solution for sending and receiving invoices.

Invoices can be sent in a variety of formats and through a variety of partners and connected operators. Kofax Invoice Portal keeps track of the format in which recipients want their invoices, and it also ensures that all the required fields are filled in.

This chapter describes the user tasks needed to start working with Kofax Invoice Portal.

Naming conventions

The following naming conventions apply to the *Kofax Invoice Portal Administrator's Guide*.

Member

Throughout this document, the term "member" is used to denote an organization or a company. A member comprises at least one member administrator.

Member administrator

The term "member administrator" is applied to users with administrator privileges.

Member user

The term "member user" is applied to users with standard privileges.

Recipient profile

A recipient profile indicates a set of custom rules regulating the general view of an invoice received by a customer (recipient.) According to these preset rules, every invoice includes or excludes specific fields. Recipient profiles also define which fields are required and which information is obligatory for a recipient.

Invoice Portal applies recipient profiles to regulate the e-invoicing relationship between customers and suppliers. For example, a recipient wants to receive invoices in the Svefaktura format. A supplier, by means of the certain recipient profile, sends an invoice in the Svefaktura format. The sent invoice is validated according to the rules of the required format, the fields are filled in correctly and correspond to the format standards.

How to register

To send or receive invoices electronically, you need to register your company in Invoice Portal.

Set up your first user account in Invoice Portal

1. For **Email address**, specify an email address to be used as the username to log in and (optional) receive notifications.
2. For **Name**, specify the name of a contact person for this user account.
3. Enter a password with a minimum of 12 characters and confirm by entering it once again.
To create a strong password, see "Password recommendations" in *Kofax Invoice Portal Help*.

Your first user account in Invoice Portal is set up. Later you can add more users with different access levels.

Specify your organization details

1. For **Country**, select the country of your legal address.
You will not be able to change the country of your legal address but you can set up more recipient offices from different countries and locations later.
2. Depending on the country selected, provide the required IDs, such as:
 - For **Organization ID**, specify the primary identifier of a legal entity in the country selected.
For example, 656591-0194.
 - For **VAT/Tax ID**, specify the identifier for payment of the Value Added Tax and/or other taxes and charges in the country selected.
For example, SE656591019401.
 - For **DUNS**, specify the universal organization identification number from Dun & Bradstreet.
For example, 13-783-3910.
 - For **GLN**, specify the Global Location Number from GS1.
For example, 4375822721300.

The party identifier is required for all countries. These IDs are required by some eDelivery networks, such as Peppol. A GLN is preferable.

For Denmark, Finland, France, Norway, and Sweden: The country-specific ID field is displayed automatically and is required.

If necessary, later you can set up more recipient offices with additional individual IDs, either official or free-form.

3. Specify your company **Legal name** as written in your statutory documents.
4. Specify the legal address.
Later you can change your legal address or set up delivery and electronic recipient addresses for offices in various countries.

Your organization details to identify you in Invoice Portal are entered. Later you can change the details, supplement member account data and, if necessary, set up more recipient offices with individual receiving settings.

Select a member role: invoice sender, invoice recipient, or both

Under **Use Invoice Portal**, select one of the following options.

- **to both send and receive invoices**: Adds you to the list of invoice senders and recipients.

- **to send invoices only:** Adds you to the list of invoice senders (suppliers.)
- **to receive invoices only:** Adds you to the list of invoice recipients (customers.)

You have selected whether you send or receive invoices via Invoice Portal, or do both. Later you will need to specify sending or receiving settings as necessary.

You can change the role at any time.

Select a membership level

Read the offer and select which subscription fits your invoicing needs best.

- **Free**
- **Basic**
- **Plus**
- **Premium**

Final steps

1. Enter the registration code, if any.
2. Read the Terms and conditions of Invoice Portal and select **We agree to the terms**.
3. Verify the information you provided and click **Done**.
A confirmation email will be sent to you to the specified email address.
4. Open the confirmation email. Click the confirmation link.
The registration is complete and confirmed. Now you can log in and configure your sending or receiving settings.
If you cannot find the confirmation email, check Spam.

Configure two-factor authentication

Follow the steps in this topic to configure two-factor authentication from the login page. For more information, see the *Kofax Invoice Portal Help*.

1. If you log in for the first time, after you enter your login credentials and click **Log in**, you are prompted to set up two-factor authentication.
 - **Yes:** Follow the steps in this topic to configure this option.
 - **No:** Continue working without two-factor authentication for the next 14 days.
 - **Cancel:** Redirects you to the login page. When you log in next time, you are prompted to set up two-factor authentication again.
2. If you select to use two-factor authentication, use a two-factor authentication application on your mobile phone, such as Microsoft Authenticator or Google Authenticator, to scan the QR-code.
3. In the application setup page blank field, enter the six-digit code from the newly created account on your mobile phone and click **Continue**.

4. Save the recovery codes. You may need these codes if you, for any reason, will not be able to use this preconfigured application.
 - a. Click **Copy**.
 - b. Save the codes to a secure location on your computer.
 - c. Click **Done**.
 - d. If you are sure that the recovery codes have been saved, click **Done**.
5. When you log in next time, after you enter your credentials, you must enter the two-factor authentication code that is automatically generated on your mobile phone. Codes are refreshed every 30 seconds.

i To avoid the time synchronization issue, we recommend that you set your mobile device to the network time.

6. To disable two-factor authentication, navigate to **Settings > User** and under **Two-factor authentication setup**, click **Deactivate**.
Also, in **Settings > User** and under **Two-factor authentication setup**, you can activate two-factor authentication at any time if it is deactivated.

Accept an invitation

If your suppliers or customers invite you to start using Invoice Portal to send or receive invoices, the first step is to accept their invitation by using an invitation code.

To accept an invitation, complete the following steps.

1. On the Invoice Portal home page, under **Accepted invitations**, click the link after "Do you have an invitation code?"
2. Enter the invitation code that was sent to you.
3. To accept the invitation, click **Continue**.

If you already have a Invoice Portal account, you can log in and view pending invitations from customers or suppliers.

Supported e-invoice formats

The following table lists and describes public e-invoice formats supported by Invoice Portal. Apart from that, a large number of customer-specific formats is implemented. You can request a quote for the implementation of your custom format from Customer Services.

In this table, the following terms are used:

- Inbound (source) invoice format: The format in which an invoice is sent by a supplier and received by Kofax Invoice Portal before transferring to the recipient (customer).
- Outbound (target) invoice format: The format in which an invoice is sent from Kofax Invoice Portal to the recipient.

- Both ways: Used both as a target and a source format.
Invoice Portal converts the sender format to the recipient format using the internal Esxml2 format.

Format	Description
BGC Invoice	Inbound only.
E2B 1.6	Both ways.
Esxml2	Both ways. This is an internal format, also used externally by some customers.
Finvoice 3	Both ways.
OIOUBL	Both ways.
OIOXML	Inbound only.
PEPPOL3	Both ways.
Pyramid	Inbound only.
Svefaktura	Both ways. Several variants are available, including customer-specific.
TEAPPS 3	Both ways.
xRechnung	Outbound only.

Matching algorithm for customers/suppliers

As part of the process of inviting customers/suppliers, the Invoice Portal checks to see whether they are already in the system. This "matching" involves an algorithm that works as described below.

Automatic matches

If only one organization is found with any of the following details, the match is automatically confirmed. No action is required from you.

- Organization number and country
- VAT number and country
- GLN (member's legal address): The GLN is used to uniquely identify a company/organization. [More information about GLNs is available on the GS1 website](#) (external link requiring Internet access).
- GLN (member's other addresses)
- GLN (ID in the registry)
- Bankgiro account number, country, and organization name
- PlusGiro account number, country, and organization name
- IBAN and organization name
- Swift/BIC, clearing number, bank account number, and organization name

Matches requiring confirmation and no matches

Sometimes the system finds several possible matches. Then you must manually confirm the match (For more information, see [how to confirm a supplier match](#) and [how to confirm a customer match](#)).

If no organization is found, the following additional searches are done to find suggestions for possible matches. If no matches are found, the company is deemed to be a new organization.

- Name*: Compared against the organization names of members (as provided in their legal addresses) in Invoice Portal.
- Name*: Compared against other member addresses as provided in Invoice Portal.
- Name*: Compared against other information sources
- Address**: Compared against the legal addresses of members in Invoice Portal.
- Address**: Compared against other member addresses as provided in Invoice Portal.
- Address**: Compared against other information sources.

*More information about how names are matched.

For example, there are two companies in the system: one named "Expert Systems Development Svenska AB" and "Expert Sverige AB". In the examples below, the system matches all the specified values to the company named "Expert Systems Development Svenska AB".

Specified value	Matched value
Expert System	Expert Systems Development Svenska AB
Expert Systems	Expert Systems Development Svenska AB
Expertsystem	Expert Systems Development Svenska AB
Expertsystems	Expert Systems Development Svenska AB
AB Expertsystem	Expert Systems Development Svenska AB
AB Expertsystems	Expert Systems Development Svenska AB
AB Expert System	Expert Systems Development Svenska AB
AB Expert Systems	Expert Systems Development Svenska AB

** All specified fields are matched in the following order:

1. C/O address, street address, zip code, city, and country
2. Street address, zip code, and country
3. Street address, city, and country
4. Zip code, city, and country

See also:

[Confirm a customer match](#)

[Confirm a supplier match](#)

Chapter 2

Invoices

Incoming invoice workflow

After you are set up as an Invoice Portal recipient, invoices sent to you through Invoice Portal are formatted, filtered, and delivered according to your settings. You can view incoming invoices in the web interface as well as at the file transport channel specified in your receiving settings.

See also: [Adjust settings related to receiving invoices](#)

Where to find received invoices

Incoming invoices are stored in Invoice Portal on the following tabs:

- **Invoice > Received** if they are received successfully. For more information, see [Manage received invoices](#).
- **Invoice > Rejected** if they if they do not comply with your receiving settings. For more information, see [Incoming invoices that are rejected](#).

File transport overview

With Invoice Portal, a number of options is available for receiving invoices:

- Directly in the Invoice Portal web interface
- Through Invoice Portal at an email address
- Through Invoice Portal using your preferred [file transport means](#)

Outgoing invoice workflow

After you are set up as an Invoice Portal sender, you can [create and send invoices](#) in the web interface, [transfer invoices from your business system](#) (for Basic, Plus, and Premium level users), and check the status of your sent invoices.




Where to find sent invoices

Outgoing invoices are stored in the Invoice Portal web interface on the following tabs:

- **Invoice** > **Sent** if sent successfully or rejected. To see whether an invoice is received or rejected, check the status. For more information, see [Manage sent invoices](#) and [Outgoing invoices that are rejected](#).
- **Invoice** > **Queued** if needs approval. For more information, see [Manage queued invoices](#).
- **Invoice** > **Drafts** if it cannot be sent to this recipient. For more information, see [Edit drafts](#).

Delivery options overview

The invoice delivery method depends on the recipient. When sending, you do not need to worry what e-invoice format your addressees prefer or what means of file transport are available to them.



-  e-invoice: Invoice Portal members receive your invoices in their preferred electronic formats by their preconfigured [file transport means](#). Invoice Portal does the format conversion for you. You can append attachments to your e-invoices.
-  PDF by email: Customers that are not members (you set them up manually or by uploading a file) and have an email address specified in their customer card receive correspondence from you [by email](#).
-  Printed by post: Customers that are not members (you set them up manually or by uploading a file) and have no email address specified in their customer card can receive correspondence from you only [by post](#).

See also:

- [How to find and edit your customer data](#)
- [Add customers](#)
- [Adjust settings related to sending invoices](#)

Create an invoice

A few important notes

- Fields shown when creating an invoice in the web interface depend largely on the information your recipient requires to have on the invoice.
- The check mark icon  indicates which fields are required. When the fields are filled in, the icon turns blue: .
- Click **More details** to view more fields per each invoice section.

Create an invoice


1. Click **Invoice** > **Create new**.


2. Under **Choose recipient**, find and click the customer to whom you want to send the invoice.

i To search, enter at least three characters of the name and/or identifier of the member company or its recipient office.

If you send invoices to this customer often, click the star next to its name. Such customers are always displayed below the search field, eliminating the need to search for them.

After you select a customer, more fields to specify invoice settings required by this customer appear.

3. Under **Invoice details**, check the automatically filled in information and change/add details as necessary.
 - a. **Invoicing Instructions:** If provided, take into account what the recipient wants included in invoices sent to it. Such instructions, if any, are shown directly under **Invoice details**.
 - b. **Invoice number:** Type a unique number or identifying text for this invoice, both numbers and letters can be used. If you leave this field blank, Invoice Portal will automatically generate a number for you (provided that this option is included in your sending settings).
 - c. Under **Supplier contact details**, provide the name of your contact person for this invoice and their email address and phone number.
 - d. Under **Buyer address**, click **More details** and check the recipient's legal address. If the buyer has several addresses, the **Name** field is displayed as a search field . Type another recipient address name, ZIP code, or address details. Select the necessary address in the search results. The address is updated accordingly and will be shown as the buyer address in the invoice, whereas the legal address of this customer will remain the same as the one specified by this customer in its account.
 - e. Under **Buyer contact details**, provide the name of your customer's contact person for this invoice and their email address and phone number.
 - f. Under **Invoice header details**, check the automatically filled in information and change/add details as necessary. Click **More details** to see more subsections.
 - **Free text:** Type important information in one paragraph. If you press Enter to make more paragraphs, such text can be misprocessed in some business systems it goes to.
 - **Buyer order number:** Enter the customer's order number for this invoice.
 - **Buyer's reference 1:** If the field is required, enter a code, cost center or name provided by the recipient for this field. The input may be used for validation. If a reference is required, the recipient should inform you of this. Otherwise, type anything.
 - **Preceding invoices:** List preceding invoices.
 - **Allowances and charges:** Specify the amount of allowances or charges that apply to the entire invoice and are reflected in the total amount. The multiplier factor uses the base amount and then modifies it by the percent you enter. For example, to give a 5% discount, enter 5 as the **Multiplier factor %**.
 - g. Under **Payment details**, check the automatically filled in information and change/add details as necessary.
 - **Days left until due date:** Payment must be made within the number of due days. This field is automatically filled in if you have already sent an invoice to this recipient.

- **Due date:** The payment must be made on the due date latest. This field is automatically filled in if the previous setting is provided.
 - **Payment reference (OCR number):** 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.
 - **Supplier's VAT/Tax ID** and **Buyer's VAT/Tax ID:** Select if you want these identifiers to be included in the invoice.
 - **Tax exempt:** Select this check box if there is no tax applicable to this invoice and specify the reason in **Tax exemption text**. Then you do not need to specify a 0% VAT in the invoice lines.
 - **Tax currency:** Defaults to the invoice currency. Specify if the VAT is in a different currency.
Then **Total VAT in other currency** is added in the **Summary** at the bottom of the invoice page. Provide the VAT amount in the specified currency in that field.
 - **Use factoring:** The check box is selected by default if a factor is specified in your sending settings. Then their information is included in the invoice. Clear the check box to remove the factor information from the invoice.
- h.** Under **Delivery address**, click **More details** and check the recipient's delivery address. If the customer has several delivery addresses, the **Name** field is displayed as a search field .
- Type another recipient address name, ZIP code, or address.
- Select the necessary delivery address in the search results. The address is updated accordingly and will be shown as the delivery address in the invoice.
- You can also specify delivery terms and carrier.
- 4.** Under **Invoice lines**, specify the products or services that the invoice pertains to and the pricing details. If you are going to bill for several different articles, add more lines by clicking **New line**. Click **More details** to include additional information such as buyer order number, delivery note number, delivery date, or additional attributes.
- a. Line:** The line number of the invoice line is assigned automatically.
 - b. Description:** Specify the item that you are invoicing.
 - c. Supplier art. No:** Specify the item number of the product/service.
 - d. Quantity:** Specify the number of units.
 - e. Unit:** Select the measurement unit. For example, if it is an object you invoice, select **pcs**. Should you invoice for a service, you can use the number of hours.
 - f. Price:** Enter the price in your chosen currency.
 - g. Unit price basis:** Enter the quantity the price is based on.
 - h. Discount %:** Enter the discount value. The discount amount is deducted automatically.
 - i. Line amount*:** Enter the resulting price for the article. If **Quantity** and **Price** are specified, the amount is calculated automatically.
 - j. VAT %*:** Specify the VAT applicable to the line. If the VAT is 0%, select the **Tax exempt** check box under **Payment details** above.

- k. **Tax category:** The category is assigned automatically.
 - l. **Allowances and charges:** Enter allowances and charges per invoice line for the customer's information. The amounts you enter do not influence the line amount or total amounts in the summary. For example, for an allowance, deduct the amount on the invoice line itself. If it is 50% and the painting really cost 1000 kr, indicate that the price is 500 kr.
Alternately, to specify allowances and charges that apply to the whole invoice and are deducted from or added to the total amount automatically, use the **Allowances and charges** at the **Invoice header** level above.
 - m. **Add traceability info:** Add the product trace ID, serial number, and manufacture date/time.
5. Under **Invoice attachments**, add a URL or attach a file. Note that the size of the attachment varies depending on your membership level. The file type must be allowed by your specific recipient.
 6. Under **Additional document references**, provide more references. Multiple types are supported.
 7. Under **Summary**, the amounts total are adjusted automatically as you edit the invoice.
 - a. To round off the **Amount due** up or down to the nearest whole number, click the **Calc** button.
 - b. For **Total prepaid amount**, specify how much of the balance has been prepaid. This amount is deducted from the amount due.
 - c. Check that the other amounts listed under **Summary** are correct. If a number is incorrect, double-check the details you specified.
 8. When you are done editing, click one of these buttons:
 - **Save:** The invoice is saved as a draft.
 - **Check:** The invoice is checked against the recipient's requirements.
 - **PDF:** The invoice is exported to PDF format, and you can download it to your computer. The file contains a "Preview" watermark. (To learn how to send an invoice as a PDF from Invoice Portal, see [Send PDF invoices](#).)
 - **Send:** The invoice is sent to the recipient. (For more information about what happens when you send an invoice, see [Outgoing invoice workflow](#).)
 - **Cancel:** The invoice is not saved, and you will not be able to access it again.

Any potential errors are displayed under the **Summary** section.

See also:

[Edit a draft invoice](#)


[Use factoring](#)

Edit draft or rejected outgoing invoices


You can edit draft invoices and invoices that have been rejected by the recipient.

Edit a draft invoice

Created invoices that are saved and not sent are placed on the list of draft invoices available on the **Drafts** tab. You can edit or delete the drafts.

1. To access the list of draft invoices, click **Invoice > Drafts**.
2. Find the invoice to change and click  **Edit**.
3. Change the details as necessary. For more information on the settings, see [Create an invoice](#).
4. Click **Save** to save the draft, **PDF** to view and download it as a PDF file, **Send** to send it, or **Cancel** to cancel the changes.


Edit an invoice rejected by the recipient

If the invoice recipient rejects your invoice, it is marked with a warning symbol  in the **Status** column under **Invoice > Sent**.

Filter to see only rejected invoices

1. Click **Invoice > Sent**.
2. Under **Filtering options**, in the **Show** drop-down list, select **Rejected**.
3. Specify other filter settings as necessary and click **Filter**.
All your sent invoices that match the search criteria are shown.

Edit your rejected invoice

1. Click **Invoice > Sent**.
2. Find the rejected invoice to correct and click  **Edit**.
3. Fix the issues listed at the bottom of the page (the reasons why the invoice was rejected are listed there) and resend the invoice.


Send PDF invoices to non-member customers

If a customer has no member account in Invoice Portal, you cannot send them invoices through the web interface. However, you can set up an integration with your business system and then transfer invoices through Invoice Portal to any customers, members and non-members included. Invoices to non-members are delivered only by post or email. Add the non-member customer's email address to send them PDF invoices by email. Otherwise the [sending by post](#) remains the only sending option to non-members. You can also [invite](#) the customers or [remind](#) them to join.

Prerequisites

- You have [integrated your business system with Invoice Portal](#).
- (Recommended) You have [specified your email address](#) for sending PDF invoices and invitations.

Now you can specify an email address for non-member customers that you have so that you can send them PDF invoices through Invoice Portal.

1. Click **Customers > Summary**.
2. Under **Check customers**, click **Check and update**.
3. Find the customer and click  **Edit**.
4. Under **Email address for receiving PDF invoices**, type the email address where the PDF invoices are to be sent.
5. Click **Save**.

Now your invoices to this customer will be received as PDF files at the email address you specified.

See also: [Outgoing invoice workflow](#)


Search for an invoice

You can find an invoice by filtering results within a target category.

1. Click **Invoice** and select one of the following: **Drafts**, **Sent**, **Received**, **Rejected**, or **Queued**, depending on the status of the invoice you want to find.
2. Under **Filtering options**, specify as many of the details as possible and click **Filter**. Matching invoices are displayed.


View an invoice

You can open an invoice and see its details.

1. Click **Invoice** and select one of the following: **Drafts**, **Sent**, **Received**, **Rejected**, or **Queued**, depending on the status of the invoice you want to open.
2. Find the invoice to view and click  **View** or anywhere within the invoice row except the buttons.

Copy an invoice


If you need to send an invoice similar to one you sent previously, use a copy of the old invoice as the basis for the new one.

1. Click **Invoice > Drafts** or **Sent**.
2. Find the invoice you want to copy and click  **Copy**.

A copy of the selected invoice opens. Edit this copy as usual and then save it as a draft or send it.

Delete an invoice

You can delete draft, queued as well as rejected incoming and outgoing invoices. Successfully sent and received invoices cannot be deleted.

1. Click **Invoice** and select one of the following: **Drafts**, **Queued**, **Sent** (for your outgoing rejected invoices), or **Rejected** (for your incoming rejected invoices from suppliers).
2. Find the invoice. Under **Filtering options**, specify as many details as possible and click **Filter**.
3. Click  **Delete** in the invoice row.
4. Confirm that you want to permanently delete the invoice.

 The invoice cannot be restored after it has been deleted.

Archive an invoice

All invoices you send and receive are automatically archived.

To access any invoice you have ever sent or received, click **Invoices > Sent** or **Received**.

Depending on your membership level, you can view invoices for a certain period of time. For example, if you are a Free member, you can see invoices from the previous calendar month and the current calendar month. However, you can save the invoices as a PDF file and store them on your computer.

Manage sent invoices

Invoices that are sent to customers are placed under **Invoice > Sent**. You can view and copy your sent invoices. If your sent invoice is [rejected](#), you can view, copy, edit, or delete it.


When your invoices are paid, you can tick them off, as shown in [Change the payment status](#) below.

View the response statuses of sent invoices

In the **Status** column, the following statuses are shown depending on the response received from the recipient side.

The status icons are color-coded:

- Grey: Expecting a response of this type.
- Blue: A positive response of this type is received.
- Red: A negative response of this type is received.

Invoice status icon	Status description
	Send: The invoice is sent.

Invoice status icon	Status description
	Reception: The invoice is received but has not been processed yet.
	Content: The information that the invoice contains is or is not valid according to the recipient's requirements.
	Workflow: Additional information about the invoice processing status is provided (usually payment due date or approval for payment.)
	Rejected by the recipient: The invoice is returned because it does not match the recipient's criteria. For more information, see Outgoing invoices that are rejected .

Check the delivery channel

You can see how each invoice is to be delivered in the **Send by** column:

- By recipient's file transport method as an e-invoice
- PDF by email
- Printed by post

For more information, see [Delivery options overview](#).

Change the payment status

Keep track of which invoices have been paid. Put a check mark next to paid invoices. Then you can filter invoices based on their payment status, as shown in [View paid invoices](#) below.

1. Find and select an invoice or several invoices.
2. Scroll to the bottom of the list of invoices and click **Change payment status**.
A check mark appears in the **Payment status** column.

You can remove a check mark using the same procedure.

View paid invoices

1. Click **Invoice > Sent**.
2. Under **Filtering options**, in the **Payment status** drop-down list, select **Paid**.
3. Specify other filter settings as necessary and click **Filter**.
All your sent invoices that match the search criteria are shown.

Manage received invoices

If a supplier sends you an invoice through Invoice Portal, it is placed under **Invoice > Received**. You can view received invoices and search for them by various criteria.

If an incoming invoice does not match your receiving settings, it is either stopped at the sender's side or, in case of fewer errors, placed under **Invoice > Rejected for your information and possibly review**.

Your membership level controls the number of invoices that can be received by you. If you receive more invoices than what is included in your membership level, these invoices are included in the list under **Received**, but you can only see the invoice date. All other information is hidden, and an account upgrade is required to make it visible.



Depending on the membership level, the available date range for incoming invoices may also be limited.

Manage rejected and suspended invoices

Invoice Portal rejects invoices that do not match the recipient's acceptance criteria. In some cases, these invoices are dismissed outright; they cannot even be sent. In case the error can be fixed easily, faulty invoices are received by the recipient who may reject them or review and accept them according to their settings and procedures. In this case, the recipient is notified by email about incoming invoices that need their attention.

Incoming invoices that are rejected

By default, incoming invoices that do not match your receiving settings are rejected. You can find them under **Invoice > Rejected**. When the sender corrects the invoice and re-sends it, it is displayed under **Invoice > Received**.

Optionally, you can [suspend or disable rejection of invalid incoming invoices](#). Then such invoices are suspended for the specified period and displayed under **Invoice > Rejected** with a warning symbol . You can accept or reject suspended invoices. If you accept a suspended invoice, it is moved to **Invoice > Received**. If you reject a suspended invoice or the review time expires, it is marked with a leftward arrow  and you can only view or delete it.

If you previously configured Invoice Portal to disable automatic acceptance of invoices in **Settings > Receiving**, you can only accept such invalid invoices or click **Notify sender** to send an email informing a sender that the member cannot accept the specified invoice.

Outgoing invoices that are rejected

If the invoices you send do not match the recipients' settings, they are rejected and shown under **Invoice > Sent** with a warning symbol  in the **Status** column. To see all rejected invoices, in the **Show** drop-down list, select **Rejected**.

An email is sent to you with information about why the invoice was rejected.

You can [edit your invoices that have been rejected](#).




Manage queued invoices

Invoice queuing is used to enhance control over which invoices transferred from your business system are actually delivered to the recipients. For more information on how to configure queuing, see [Require manual confirmation before sending transferred invoices](#).

To access the invoice queue, click **Invoice** > **Queued**. You can view, send, or delete queued invoices. Before sending a queued invoice, check the content for compliance. Invoices to be sent by post cost extra and may need special attention.

Check the delivery channel

You can see how each invoice is to be delivered in the **Send by** column:


-  By recipient's file transport method as an e-invoice
-  PDF by email
-  Printed by post

For more information, see [Delivery options overview](#).

Send queued invoices

1. Click **Invoice** > **Queued**.
2. Click an invoice to open and verify the content.
3. Click **Back** to return to the list of queued invoices.
4. Select the invoice you want to send, specify the default deadline and click **Send invoices**. Invoice Portal will proceed to deliver the selected invoice to its recipient.

Add a logo to your invoices

 To access these settings, you must be logged in as a member administrator.


You can upload an image file with your logotype. It will be included in printed invitations and reminders and, for invoice senders, in sent PDF and printed invoices.

Supported image formats: GIF, JPG, JPEG, PNG, BMP. Maximum file size: 2 MB.

1. Click **Settings** > **Member account**.
2. Under **Logotype**, click **Upload**.
3. Select the image file in the file system explorer and click **Open**.
4. Click **Save** at the bottom of the page.

See also: [Change your account settings](#)

Set the start value for invoice numbers

 To access these settings, you must be logged in as a member administrator.

All invoices have a unique invoice number. These numbers can be set manually per invoice or Invoice Portal can automatically assign each invoice a number that is based on a start value.

1. Click **Settings > Sending**.
2. Under **Misc**, select **Automatically provide next invoice number**.
3. For **Start value**, type a number.
4. Click **Save** at the bottom of the page.

See also: [Change your account settings](#)

Chapter 3

Customers

Connect your customers

Before you can start sending invoices to customers, you need to connect them to Invoice Portal. These steps and concepts are involved.

Add	First add your customers to Invoice Portal.
Invite	Then invite them to join Invoice Portal. If you are a free member, you must upgrade to a higher membership level to invite customers using an external operator. These customers are listed when you click More to reach.
Confirm	Some customers require more processing before you can invite them. In these cases, you might need to confirm the customer match or add missing contact information .
Check	At any part of the process, see in which stage of the onboarding process your customers are .
Remind	<ul style="list-style-type: none">• Remind customers you already invited• See which customers accepted your invitation but have not started receiving electronic invoices
Done	Find out which customers are currently receiving e-invoices from you

Add customers

Three methods are available to add customers:

- [Add a customer by uploading a file from your business system](#)
- [Add customers manually](#)
- [Search for and choose a customer](#) (among connected organizations)

After customers are added, you can [invite them](#) so that you can send them invoices through Invoice Portal.

Add multiple customers by uploading a file

To add several customers at a time, use the Upload file feature. You can take customer information from your business system and insert it into a single-sheet Microsoft Excel file, which is then used to import the information into Invoice Portal. You can also use our Excel template if you want to manually enter the information into the file.

To add customers by uploading an Excel file, complete the following steps.

1. Click **Customers > Summary**.
2. Under **Add customers**, click the **Upload file** button.
3. Create an Excel file. You can use our guide on how to extract this information from your business system. You can also use our Excel template.

! The organization number for each Sweden-based customer must always be included and written with a hyphen. The supplier ID must also be included.

4. Upload the Excel file by clicking the **Choose** button and selecting your file.

i The file should only have one sheet. If there are several sheets in the file, only the information on the first sheet will be imported.

5. Map your columns to fields in Invoice Portal. This step tells the system which columns in the Excel file correspond to which fields in Invoice Portal.
If you use the Excel template, all fields are mapped automatically.
If you use your own Excel file and there are numbers in the column headings and they correspond to the numbers on the **Add customers by uploading a file from your system** page, all fields are mapped automatically.
If your Excel file does not have any numbers in the column headings, this mapping only needs to be done the first time. If you later upload a file with the same headings, the system will remember the mapping and provide it as a suggestion for confirmation. Not all fields need to be included. For example, if you add suppliers from the United Kingdom, you can skip the Bankgiro (Sweden) field.
6. Click the **Upload** button.

After you add customers, you can [invite them](#) so that you can send them invoices through Invoice Portal.

Add a customer manually

To add a customer manually, complete the following steps.

1. Click **Customers > Summary**.
2. Under **Add customers**, click the **Add one manually** button.
3. Specify as much information about the customer as possible. A few important notes:
 - **Action date and 0:** The action date is for your own internal use. The deadline is included on the invitations and reminders that you send to customers. For example, you can set the

action date for a week after the deadline as a reminder to yourself to follow up on the status of the customer and see whether they accepted your invitation.

- **Tip:** If the customer is based in Sweden, type the customer's organization number in the **Identifier** box. Click **Add** and then click **Get address**. Now their name and address is automatically filled in.
4. Provide a customer ID. This ID is used throughout Invoice Portal as another way to identify the customer. For example, this ID can correspond to the one in your internal master data system.
 5. (Optional) Under **Email address for receiving PDF invoices**, type the email address where the PDF invoices are to be sent. If you do not fill this field, you can send this customer invoices and invitations only by post until they become Invoice Portal members.
 6. Click the **Add** button at the bottom of the screen.

After you add customers, you can [invite them](#) so that you can send them invoices through Invoice Portal.

Add an existing Invoice Portal customer

You can search for a customer that is already a member of Invoice Portal or that belongs to other operator-connected organizations.

To add a customer by searching for them, complete the following steps.

1. Click **Customers > Summary**.
2. Under **Add customers**, click the **Search and choose** button.
3. In the search box at the top, type at least three letters. The system can search for name, address, and email address.
4. In the list of search results, select the customer to add.
5. Specify a deadline for the customer. The deadline is included in the invitations and reminders that you send to the customer. For example, you can state that after the deadline, you will no longer send paper invoices.
6. Click **Add**.

After you add customers, you can [invite them](#) so that you can send them invoices through Invoice Portal.



Invite customers

After you [add customers](#), the next step is to invite them so that you can send invoices through Invoice Portal. You can send invitations by email (free) or postal mail (at extra charge).

i Some customers cannot be invited until you [confirm their match](#). Also, customers need to have either an email or a postal address. If they do not, you will not be able to invite them. Invoice Portal informs you when you need to [add missing contact information](#).

To invite customers, complete the following steps.

1. Click **Customers > Summary**.
2. Click the **Ready to be invited** button.

3. [Edit the invitation text](#) by clicking the **Invitation text** button.
4. Select which customers to invite by checking the box next to their supplier ID. To select all customers, click **All** in the **Select** drop-down menu. To search for a specific customer, type the search criteria in the text box.
5. Specify whether to send the invitations by email or postal mail when both options are available. The **Send by** column indicates how a customer can be invited:  (mail),  (email), or either if both options are available to the customer.
6. To invite customers by email, specify the deadline and click **Send email**. To invite them by postal mail (at extra charge), specify the deadline and click **Send mail**.
7. Select **Auto reminder** to automatically remind customers that are not responding to your invitation.

A confirmation email is also sent to you; it provides a summary of how many customers were invited and other information. The customers you invited are now removed from the "Ready to be invited" list.

See also: [Check the status of invitations to customers](#)

Edit the invitation sent to customers

When you invite customers to use Invoice Portal, an email or a letter is sent to them. Invoice Portal provides a number of templates for this invitation. You can edit these templates to fit your needs.

To edit the invitation text, complete the following steps.

1. Click **Customers > Invitation text**.
2. Select which type of customer you are inviting.
 - Members who already receive invoices through Invoice Portal
 - Members who already send invoices through Invoice Portal
 - Those who are in the network but have another operator
 - New members
3. Select the language.
4. In the **Invitation text** box, edit the message to send to customers. The message you specify here is added after the standard information that is included in the invitations. (Click **Switch to the template text** to use the standard message.)
5. Adjust the sender and their contact information, if necessary.
6. Preview the invitation by clicking on of the preview links.
7. Click **Save** at the bottom of the page.

Check the status of invitations to customers

To see in which stage of the onboarding process your customers are, complete the following steps.

1. Click **Customers > Summary**.
2. Under **Check customers**, click **Check and update**.

3. Then you can:

- Search for a particular customer by typing their name, ID, or address in the search box at the top and clicking **Filter**.
- Search for customers in a particular step of the onboarding process by selecting the stage and clicking **Filter**.
- Filter the results based on how the customers were invited (email or letter) by selecting how they were invited and clicking **Filter**.
- Filter the results based on which deadline the customers were assigned by specifying the deadline span and clicking **Filter**.
- Sort customers based on different criteria by clicking the column heading.

See also:

[Invite customers](#)

[Remind customers](#)



[Update a customer's address](#)

[Export customer information to Microsoft Excel](#)

Remind customers

Sometimes customers need to be reminded to sign up as members and accept your invitation to start receiving invoices through Invoice Portal.

To send reminders to these customers, complete the following steps.


1. Click **Customers > Summary**.
2. Under **Remind**, click the **Has been invited** button.
3. Search for a particular customer by typing their name, organization number, or other information and pressing **Enter**.
4. If applicable, filter the list of customers by specifying the invitation time span.
5. Click **Invitation reminder** to [edit the reminder text](#).
6. Select which customers to remind.
7. Specify whether to send the reminders by email or postal mail when both options are available. The **Send by** column indicates how a customer can be reminded:  (mail),  (email), or either if both options are available for the customer.
8. To remind customers by email, specify the deadline and click **Send email reminder**. To remind them by postal mail (at extra charge), specify the deadline and click **Send postal mail reminder**.
9. Select **Auto reminder** to automatically remind customers that are not responding to your invitation.

Confirm a customer match

The matching function helps keep your customer list up-to-date.

Invoice Portal searches among all members and connected operators for information that corresponds to your customers. If a match is found and the information is identical, you do not need to do anything. If the match is uncertain, you must manually confirm it before you [invite the customer](#).

To confirm a customer match, complete the following steps.

1. Click **Customers > Summary**.
2. Under **Confirm**, you can see if you have any matches to confirm.
3. Click **Confirm match**.
4. Find the customer and click  **Edit**.
5. In the list of possible matches, select the one that corresponds to the customer you selected. If none of the suggestions are correct, select **None of the suggested**.

See also: [Matching algorithm for customers/suppliers](#)

See which customers accepted your invitation

After customers set up an account and accept your invitation, it can be a while before you send them an e-invoice and they get started receiving invoices through Invoice Portal.

To see which customers accepted your invitation but have not yet received an e-invoice, complete the following steps.

1. Click **Customers > Summary**.
2. Under **Remind**, click the **Has accepted your invitation** button.
3. Search for a particular customer by typing their name, organization number, or other information and pressing Enter.

See also:

[Remind customers](#)

[See which customers are receiving invoices](#)

See which customers are receiving invoices

To see which customers you are sending invoices to through Invoice Portal, complete the following steps.

1. Click **Customers > Summary**.
2. Under **Remind**, click the **Has received invoices** button.

3. Search for a particular customer by typing their name, organization number, or other information and pressing Enter.

See also:

- [Connect your customers](#)
- [See which customers accepted your invitation](#)

View and accept pending invitations from customers

To see which customers invited you to start sending them invoices through Invoice Portal and accept their invitations, complete the following steps.


1. On the Invoice Portal home page, under **Accept invitations**, click the link after "customers would like you to receive their invoices through Invoice Portal".
2. Select the invitations to accept.
3. Click **Accept**.

If you have an invitation code but it is not listed, click the **Click here** link to add it manually.

See also: [Accept an invitation using an invitation code](#)

Delete a customer

Deleting a customer card does not delete the invoices you have sent them.


1. Click **Customers > Summary**.
2. Under **Check customers**, click **Check and update**.
3. Find the customer, and click  **Delete**.
4. Confirm that you want to delete the customer.

Customer information

Add missing information for customers

Before you can [invite customers](#), they need to have an email address, a postal address, or both. If they do not, you will not be able to invite them. Invoice Portal informs you when you need to add missing contact information.

To add missing information for customers, complete the following steps.

1. Click **Customers > Summary**.
2. Under **Confirm**, click the **Missing email and postal address** button.
3. Select a customer and click  **Edit**.
4. Add an email address.

5. Add a postal address.

If the customer is based in Sweden, under **Party identifiers**, type the customer's organization number or Bankgiro account number in the **Identifier** field. Click **Add** and then **Get address**. Now their name and address is automatically filled in.

6. Specify or change other details, if applicable.

7. Click **Save**.

Change customer information

You can edit some of the information that is associated with your customers. You can change details such as their address, organization number, bank account numbers, and in which stage they are.

1. Click **Customers > Summary**.

2. Under **Check customers**, click **Check and update**.

3. Find the customer, and click  **Edit**.

4. Change the appropriate information. A few important notes:

- To automatically fill in their name and address (if the organization is based in Sweden), type their bankgiro number or name and click **Get address**.
- To send customer invoices in PDF format, under **Email address for receiving PDF invoices**, type an email address.

5. Click **Save**.

Export customer information to Microsoft Excel

You can export customer information such as name, address, organization number, and invoice log to a Microsoft Excel file.

1. Click **Customers > Summary**.

2. Under **Check customers**, click **Check and update**.

3. Select which customers to include in the Microsoft Excel file.

4. Click **Export to Excel**.

When the file is ready for download, you are notified in an Invoice Portal message. (For more information, see [how to view messages](#).)

Update a customer's address


If a customer changes an address and updates their own Invoice Portal account, you must also update this information from your side.

To update a customer's address, complete the following steps.

1. Click **Customers > Summary**.

2. Under **Check customers**, click **Check and update**.

3. To automatically update a customer's address, select the customer and click **Get address**. This function only works if the customer is based in Sweden and an organization number or Bankgiro account number is associated with their account.

4. To manually update a customer's address, select the customer and click  **Edit**. Edit the necessary information and click **Save**.

Chapter 4

Suppliers

Connect your suppliers

Before you can start sending invoices to suppliers, you need to connect them to Invoice Portal. These steps or concepts are involved:

Add	First add your suppliers to Invoice Portal.
Invite	Then invite them to join Invoice Portal. If you are a free member, you must upgrade to a higher membership level to invite suppliers using an external operator. These suppliers are listed when you click More to reach.
Confirm	Some suppliers require more processing before you can invite them. In these cases, you might need to confirm the supplier match or add missing contact information .
Check	At any part of the process, see in which stage of the onboarding process your suppliers are .
Remind	<ul style="list-style-type: none">• Remind suppliers you already invited• Remind suppliers that accepted your invitation but have not started sending electronic invoices
Done	Find out which suppliers are currently sending you e-invoices

Add suppliers

Use one of the following procedures to add suppliers:

- [Add a supplier by uploading a file from your business system](#)
- [Add suppliers manually](#)
- [Search for and choose a supplier](#) (among connected organizations)

After suppliers are added, you can [invite them to send invoices](#) through Invoice Portal.

Add multiple suppliers by uploading a file

To add several suppliers at a time, use the **Upload file** feature. You can take supplier information from your business system and insert it into a single-sheet Microsoft Excel file, which is then used to import the information into Invoice Portal. You can also use our Excel template if you want to manually enter the information into the file.

To add suppliers by uploading an Excel file, complete the following steps.

1. Click **Customers > Summary**.
2. Under **Add suppliers**, click the **Upload file** button.
3. Create an Excel file. You can use our guide on how to extract this information from your business system. You can also use our Excel template.

! The organization number for each Sweden-based supplier must always be included and written with a hyphen. The supplier ID must also be included.

4. Upload the Excel file by clicking the **Choose** button and selecting your file.

i The file should only have one sheet. If there are several sheets in the file, only the information on the first sheet will be imported.

5. Map your columns to fields in Invoice Portal. This step tells the system which columns in the Excel file correspond to which fields in Invoice Portal.
If you use the Excel template, all fields are mapped automatically.
If you use your own Excel file and there are numbers in the column headings and they correspond to the numbers on the **Add suppliers by uploading a file from your system** page, all fields are mapped automatically.
If your Excel file does not have any numbers in the column headings, this mapping only needs to be done the first time. If you later upload a file with the same headings, the system will remember the mapping and provide it as a suggestion for confirmation. Not all fields need to be included. For example, if you add suppliers from the United Kingdom, you can skip the Bankgiro (Sweden) field.
6. Click the **Upload** button.

After you add suppliers, you can [invite them](#) so that you can receive invoices from them through Invoice Portal.

Add a supplier manually

To add a supplier manually, complete the following steps.

1. Click **Suppliers > Summary**.
2. Under **Add suppliers**, click the **Add one manually** button.
3. Specify as much information about the supplier as possible. A few important notes:
 - **Action date and 0:** The action date is for your own internal purposes. The deadline is included in the invitations and reminders that you send to suppliers. For example, you can

set the action date for a week after the deadline as a reminder to yourself to follow up on the status of the supplier and see whether they accepted your invitation.

- **Tip:** If the supplier is based in Sweden, type the supplier's organization number in the **Identifier** box. Click **Add** and then click **Get address**. Now their name and address is automatically filled in.
4. Provide a supplier ID. This ID is used throughout Invoice Portal as another way to identify the supplier. For example, this ID can correspond to the one in your internal master data system.
 5. Click the **Add** button at the bottom of the screen.

After you add suppliers, you can [invite them](#) so that you can receive invoices from them through Invoice Portal.

Add an existing Invoice Portal supplier

You can search for a supplier that is already a member of Invoice Portal or that belongs to other operator-connected organizations.

1. Click **Suppliers > Summary**.
2. Under **Add suppliers**, click the **Search and choose** button.
3. In the search box at the top, type at least three letters. The system can search for name, address, and email address.
4. In the list of search results, select the supplier to add.
5. Specify a deadline for the supplier. The deadline is included in the invitations and reminders that you send to the supplier. For example, you can state that after the deadline, you will no longer send paper invoices.
6. Click **Add**.

After you add suppliers, you can [invite them](#) so that you can receive invoices from them through Invoice Portal.



Invite suppliers

After you [add suppliers](#), the next step is to invite them so that you can send invoices through Invoice Portal. You can send invitations by email (free) or postal mail (at extra charge).

i Some suppliers cannot be invited until you [confirm their match](#). Also, suppliers need to have either an email or a postal address. If they do not, you will not be able to invite them. Invoice Portal informs you when you need to [add missing contact information](#).

To invite suppliers, complete the following steps.

1. Click **Suppliers > Summary**.
2. Click the **Ready to be invited** button.
3. [Edit the invitation text](#) by clicking the **Invitation text** button.
4. Select which suppliers to invite by checking the box next to their supplier ID. To select all suppliers, click **All** in the **Select** drop-down menu. To search for a specific supplier, type the search criteria in the text box.

5. Specify whether to send the invitations by email or postal mail when both options are available. The **Send by** column indicates how a supplier can be invited:  (mail),  (email), or either if both options are available for the supplier.
6. To invite suppliers by email, specify the deadline and click **Send email**. To invite them by postal mail (at extra charge), specify the deadline and click **Send mail**.
7. Select **Auto reminder** to automatically remind suppliers that are not responding to your invitation.

A confirmation email is also sent to you; it provides a summary of how many suppliers were invited and other information. The suppliers you invited are now removed from the **Ready to be invited** list.

See also: [Check the status of invitations to suppliers](#)

Edit the invitation sent to suppliers

When you invite suppliers to use Invoice Portal, an email or a letter is sent to them. Invoice Portal provides a number of templates for this invitation. You can edit these templates to fit your needs.

To edit the invitation text, complete the following steps.

1. Click **Suppliers > Summary**.
2. Select which type of supplier you are inviting.
 - Members who already receive invoices through Invoice Portal
 - Members who already send invoices through Invoice Portal
 - Those who are in the network but have another operator
 - New members
3. Select the language.
4. In the **Invitation text** box, edit the message to send to suppliers. The message you specify here is added after the standard information that is included in the invitations. (Click **Switch to the template text** to use the standard message.)
5. Adjust the sender and their contact information, if necessary.
6. Preview the invitation by clicking on of the preview links.
7. Click **Save** at the bottom of the page.

Check the status of invitations to suppliers

To see in which stage of the onboarding process your suppliers are, complete the following steps.

1. Click **Suppliers > Summary**.
2. Under **Check suppliers**, click **Check and update**.
3. Then you can:
 - Search for a particular supplier by typing their name, ID, or address in the search box at the top and clicking **Filter**.

- Search for suppliers in a particular step of the onboarding process by selecting the stage and clicking **Filter**.
- Filter the results based on how the suppliers were invited (email or letter) by selecting how they were invited and clicking **Filter**.
- Filter the results based on which deadline the suppliers were assigned by specifying the deadline span and clicking **Filter**.
- Sort suppliers based on different criteria by clicking the column heading.

See also:

[Invite suppliers](#)

[Remind suppliers](#)

[Update a supplier's address](#)

[Export supplier information to Microsoft Excel](#)

Remind suppliers

After you invite suppliers to start sending invoices to you through Invoice Portal, you might need to remind them.

When a supplier accepts your invitation, they have tentatively agreed to start sending electronic invoices to you. Sometimes they need to be reminded that you want to receive your invoices electronically through Invoice Portal.

- [Edit the startup reminder text](#)
- [Remind suppliers you already invited](#)
- [Remind suppliers that accepted your invitation](#)

Edit the startup reminder sent to suppliers

After suppliers accept your invitation and set up an account, sometimes you need to send them a reminder to start sending invoices through Invoice Portal.

To edit the text reminding them to start sending invoices through Invoice Portal, complete the following steps.



1. Click **Suppliers > Startup reminder**.
2. Select the language.
3. In the **Invitation text** box, edit the message to send to suppliers. Two templates are available: one where you encourage suppliers to send invoices through Invoice Portal (the "wish" template) and another where you say that they must do so (the "demand" template). The message you specify here is added after the standard information that is included in the reminders.
4. [Edit the invoicing instructions](#), if any.
5. Adjust the sender and their contact information, if any.
6. Preview the reminder by clicking one of the preview links.

7. Click **Save** at the bottom of the page.

Remind suppliers you already invited

Sometimes suppliers need to be reminded to sign up as members and accept your invitation to start receiving invoices through Invoice Portal.



To send reminders to these suppliers, complete the following steps.

1. Click **Suppliers > Summary**.
2. Under **Remind**, click the **Has been invited** button.
3. Search for a particular supplier by typing their name, organization number, or other information and pressing Enter.
4. If applicable, filter the list of suppliers by specifying the invitation time span.
5. Click **Invitation reminder** to [edit the reminder text](#).
6. Select which suppliers to remind.
7. Specify whether to send the reminders by email or postal mail when both options are available. The **Send by** column indicates how a supplier can be reminded:  (mail),  (email), or either if both options are available for the supplier.
8. To remind suppliers by email, specify the deadline and click **Send email reminder**. To remind them by postal mail (at extra charge), specify the deadline and click **Send postal mail reminder**.
9. Select **Auto reminder** to automatically remind suppliers that are not responding to your invitation.

Remind suppliers that accepted your invitation

After suppliers accept your invitation and set up an account, sometimes you need to send them a reminder to start sending invoices through Invoice Portal.

To send reminders to these suppliers, complete the following steps.


1. Click **Suppliers > Summary**.
2. Under **Remind**, click the **Has accepted your invitation** button.
3. Search for a particular supplier by typing their name, organization number, or other information and pressing ENTER.
4. Click **Startup reminder** to [edit the text](#).
5. Select which suppliers to remind.
6. Specify whether to send the reminders by email or postal mail when both options are available. The **Send by** column indicates how a supplier can be reminded:  (mail),  (email), or either if both options are available for the supplier.
7. To remind suppliers by email, specify the deadline and click **Send email reminder**. To remind them by postal mail (at extra charge), specify the deadline and click **Send postal mail reminder**.

Confirm a supplier match

The matching function helps keep your supplier list up-to-date.

Invoice Portal searches among all members and connected operators for information that corresponds to your suppliers. If a match is found and the information is identical, you do not need to do anything. If the match is uncertain, you must manually confirm it before you [invite the supplier](#).

To confirm a supplier match, complete the following steps.

1. Click **Suppliers > Summary**.
2. Under **Confirm**, you can see if you have any matches to confirm.
3. Click **Confirm match**.
4. Find the supplier and click  **Edit**.
5. In the list of possible matches, select the one that corresponds to the supplier you selected. If none of the suggestions are correct, select **None of the suggested**.


See also: [Match algorithm for supplier](#)

See which suppliers are sending invoices

To see which suppliers are sending invoices to you through Invoice Portal, complete the following steps.

1. Click **Suppliers > Summary**.
2. Under **Remind**, click the **Has sent invoices** button.
3. Search for a particular supplier by typing their name, organization number, or other information and pressing Enter.

Block and unblock suppliers

 To access these settings, you must be logged in as a member administrator.

All invoices sent to you are checked against your list of blocked suppliers. If you block a supplier and they try to send you an invoice, they receive a message "You are blocked as a supplier by the receiving member." The invoice is then saved to drafts. Nonetheless, invoices transferred from business systems may still come through. At the recipient side, they are stored in the web interface [on the Rejected tab](#).

Restrict invoice senders (create a white list)

You can enable receiving invoices only from the suppliers you have added. To view the list of your suppliers, go to **Suppliers > Summary** and click **Check and update**.


❗ We recommend using a white list only in very specific security-driven cases. Using a [black list](#) is less error-prone.

1. Click **Settings > Receiving**.
2. Under **Validation of supplier information**, select **Receive invoices only from suppliers whose identifier or payment method are on your supplier list**.
Suppliers not on your list will not be able to send you invoices through Invoice Portal.
3. Click **Save** at the bottom of the page.

Block suppliers (create a black list)

1. Click **Settings > Receiving**.
2. Under **Validation of supplier information**, click **Click here**.
A page with the list of your blocked suppliers opens.
3. Click **New line**.
4. Select the country and identifier type, then enter the supplier's identifier in the **Identifier** field.
For example, if you select organization number as the identifier type, then type that number.
5. (Optional) Specify payment information. First select the payment type, then provide the account number.
6. (Optional) Type the reason why you are blocking the supplier. This message is not displayed to the supplier.
7. Click **Save**.

Unblock suppliers

1. Click **Settings > Receiving**.
2. Under **Validation of supplier information**, click **Click here**.
A page with the list of your blocked suppliers opens.
3. Under **Blocked suppliers**, find the supplier to unblock and click  **Delete**.
4. Confirm that you want to unblock the supplier by clicking **Yes**.

View and accept pending invitations from suppliers

To see which suppliers invited you to start sending them invoices through Invoice Portal and accept their invitations, complete the following steps.


1. On the Invoice Portal home page, under **Accept invitations**, click the link after "suppliers would like you to receive their invoices through Invoice Portal."
2. Select the invitations to accept.
3. Click **Accept**.

If an invitation code is not listed, click the **Click here** link to add it manually.

See also: [Accept an invitation using an invitation code](#)

Delete a supplier

Deleting a supplier card does not delete the invoices they have sent to you, and they are still able to send you new invoices.


1. Click **Suppliers > Summary**.
2. Under **Check suppliers**, click **Check and update**.
3. Find the supplier and click  **Delete**.
4. Confirm that you want to delete the supplier.

Supplier information

Add missing information for suppliers


Before you can [invite suppliers](#), they need to have an email address, a postal address, or both. If they do not, you will not be able to invite them. Invoice Portal informs you when you need to add missing contact information.

To add missing information for suppliers, complete the following steps.

1. Click **Suppliers > Summary**.
2. Under **Confirm**, click the **Missing email and postal address** button.
3. Select a supplier and click  **Edit**.
4. Add an email address.
5. Add a postal address.
If the supplier is based in Sweden, under **Party identifiers**, type the supplier's organization number or Bankgiro account number in the **Identifier** field. Click **Add** and then **Get address**. Now their name and address is automatically filled in.
6. Specify or change other details, if applicable.
7. Click **Save**.

Change supplier information

You can edit some of the information that is associated with your suppliers. You can change details such as their address, organization number, bank account numbers, and in which stage they are.

1. Click **Suppliers > Summary**.
2. Under **Check suppliers**, click **Check and update**.
3. Find the supplier, and click  **Edit**.
4. Change the appropriate information. A few important notes:
 - To automatically fill in their name and address (if the organization is based in Sweden), type their Bankgiro number or name and click **Get address**.
 - To send supplier invoices in PDF format, under **Email address for receiving PDF invoices**, type an email address.

5. Click **Save**.

Export supplier information to Microsoft Excel

You can export supplier information such as name, address, organization number, and invoice log to a Microsoft Excel file.


1. Click **Suppliers > Summary**.
2. Under **Check suppliers**, click **Check and update**.
3. Select which suppliers to include in the Microsoft Excel file.
4. Click **Export to Excel**.

When the file is ready for download, you are notified in an Invoice Portal message. (For more information, see [how to view messages](#).)

Update a supplier's address

If a supplier changes address and updates their own Invoice Portal account, you must also update this information from your side.

To update a supplier's address, complete the following steps.

1. Click **Suppliers > Summary**.
2. Under **Check suppliers**, click **Check and update**.
3. To automatically update a supplier's address, select the supplier and click **Get address**. This function only works if the supplier is based in Sweden and an organization number or Bankgiro account number is associated with their account.
4. To manually update a supplier's address, select the supplier and click  **Edit**. Edit the necessary information and click **Save**.


Chapter 5

General settings

Edit user settings

These settings specify users' contact information and how often they receive notifications.

To edit user settings, complete the following steps.

1. To edit your own settings, click **Settings > User**.
2. To edit another user's settings, click **Settings > Account users**. Then find the user to edit and click  **Edit**.
3. Edit the user's name and contact information. If you are editing your own settings, you can also [change your email address](#) and [change your password](#).
4. [Change when and how the user receives notifications](#).
5. Click **Save** at the bottom of the page.

Change email address

To change your email address, complete the following steps.

1. Click **Settings > User**.
2. Click the **Change email** link.
3. Enter the new email address.
4. Click **Send request**.

Change your password

To change your password, complete the following steps.

1. Click **Settings > User**.
2. Click the **Change password** link.
3. Enter the current password.
4. Enter the new password.
5. Click **Save**.

The new password will go into effect immediately.


Change when and how a user receives notifications

i To access these settings, you must be logged in as a member administrator.

You can change when and how a user receives notifications. Users can be notified by email or through Invoice Portal web interface.

Email notifications are sent once a day. Notifications that are sent through Invoice Portal web interface are sent immediately. (For more information, see [how to view messages](#).)



To change when and how a user receives notifications, complete the following steps.

1. To edit another user's settings, click **Settings > Account users**.
2. Find the user and click  **Edit**.
3. Under **Member-specific settings**, specify when the user is to receive notifications and how (email or the Invoice Portal web interface).
4. To send a summary of the account's daily activities to the user, select **Receive email with member daily activities**.
5. Click **Save** at the bottom of the page.

View messages

Invoice Portal automatically sends messages after you perform certain tasks, such as generating a report or updating supplier information. These messages are listed under Messages.

To view your messages, complete the following steps.

1. Scroll down to the page footer. At the bottom of the page, you see an overview of how many unread messages you have: **Messages: 1**
2. Click the linked number to be taken to your messages.
3. Then you can:
 - Open a message by double-clicking the message link. Unread messages are indicated by the  symbol.
 - Mark unread messages as read by clicking the check mark  symbol.
 - Select how many message links to display by selecting 10, 25, or 50 on the drop-down menu.

Switch to another member user

i To access these settings, you must be logged in as a member administrator.

Sometimes, you may need to switch to a different member user. For example, if you work at an accounting firm that handles the invoicing for multiple companies, you may need to switch among

the various Invoice Portal member accounts by performing one of the following procedures from the header area.

- Click your user name and select which member to switch to.
- Click the User menu icon and select **Choose member** to open the list of your members.

Chapter 6

Administrator settings

Change your account settings

i To access these settings, you must be logged in as a member administrator.

The first time that you use Invoice Portal, we recommend that you specify your account settings.

1. Click **Settings > Member account**.
2. Under **Use Invoice Portal**, specify whether to use Invoice Portal for sending or receiving invoices, or both.
3. Under **Party identifiers**, add your identifying information.
4. Under **Tax certificates**, specify your registered office and whether you have a tax certificate, or remove a VAT rate.
5. Under **Invites and reminders**, specify the following information for sending invites and reminders to suppliers or customers:
 - Your email address
 - Default reply deadline
 - Whether to send automatic reminders to non-responders
6. Under **Logotype**, upload a logo to be displayed on your printed invites and reminders, as well as PDF and printed invoices.
7. Under **Estimated savings**, change how estimated savings are calculated.
8. Under **Member API keys**, generate an API key.
9. Click **Save** at the bottom of the page.

See also:

[Adjust settings related to receiving invoices](#)

[Adjust settings related to sending invoices](#)

Change membership level

i To access these settings, you must be logged in as a member administrator.

Information about your membership level is included in the footer of each page in Invoice Portal.

If you are upgrading your account, the change goes into effect immediately, and you have access to all the features included in that membership level. If you are downgrading, the change goes into effect at the end of the contracted period.

1. Click the **Upgrade** link in the footer.
2. Read through the features and decide which level best suits your needs.
3. Under the level descriptions, click the level to which you want to change. For the Plus and Premium levels, select the invoice volume on the drop-down menu.
4. If applicable, type a registration code under **Enter a registration code**.
5. Add a comment by clicking **Add comment** and then selecting whether you want information about connecting Invoice Portal with your billing system, information about using virtual printer solutions, or any other information regarding your membership (if so, type a short message).
6. Click **Change**.

Customize your member account

Select whether you send or receive invoices through Invoice Portal

i To access these settings, you must be logged in as a member administrator.

These settings control whether you are listed in Invoice Portal as an invoice recipient or sender, or both. For example, when one of your suppliers creates an invoice, they select whom to send the invoice to in a list of available recipients. You will be in that list, if you select to receive invoices through Invoice Portal.

Specify whether you intend to send or receive invoices through Invoice Portal.

1. Click **Settings > Member account**.
2. Under **Use Invoice Portal**, select one of the following options:
 - **to both send and receive invoices**: Adds you to the list of invoice senders and recipients.
 - **to send invoices only**: Adds you to the list of invoice senders (suppliers.)
 - **to receive invoices only**: Adds you to the list of invoice recipients (customers.)
3. Click **Save** at the bottom of the page.

Party identifiers


i To access these settings, you must be logged in as a member administrator.

Identifiers, such as your VAT or organization number, help suppliers and customers find you in Invoice Portal. They are shown on invoices sent to you or by you. Specify at least one. Depending on your country, there may be more identifiers required during registration. You can add more afterwards as shown in this section.

You may need to provide specific types of identifiers, for example, IBAN, GLN, or VAT/Tax ID, if you plan to work with operators, such as Peppol. Find out their requirements and provide necessary data to ensure your invoices are received and sent successfully.


To send invoices to some Scandinavian countries, the sender must provide an Organization ID. In this case, you can type anything for this field as it must not be empty in the invoices.

In case of multiple recipient addresses, specify [additional identifiers](#) per each recipient under **Settings > Addresses**. Then invoices are routed to each recipient directly rather than to your primary address.

1. Click **Settings > Member account**.
2. Under **Party identifiers**:
 - To add an identifier, select the country, type of identifier, and enter the identifier. Then click **Add**.
 - To change the value of an identifier, enter the new value in the appropriate field.
 - To delete an identifier, find it on the list and click  **Delete**.
3. Click **Save** at the bottom of the page.

See also: [Change your account settings](#)

Specify your tax certificate and registered office

 To access these settings, you must be logged in as a member administrator.

A registered office is the official address of a company or any other legal entity. Tax certificates are standard in some countries, and they are issued by tax agencies.

Invoices include information about the registered office and tax certificate, if it is included in the recipient format.


Your legal office is provided and may be altered [on the Addresses page](#).

To specify your registered office, complete the following steps:

1. Click **Settings > Member account**.
2. If your company has a certificate from a tax agency, under **Tax certificates**, select a certificate type and click **Add**. Provide extra details, if required for this type.
3. For **Registered office**, enter where your registered office is located.
4. Click **Save** at the bottom of the page.

See also: [Change your account settings](#)

Add a logo to your invoices

 To access these settings, you must be logged in as a member administrator.

You can upload an image file with your logotype. It will be included in printed invites and reminders and, for invoice senders, in sent PDF and printed invoices.

Supported image formats: GIF, JPG, JPEG, PNG, BMP. Maximum file size: 2 MB.

1. Click **Settings** > **Member account**.
2. Under **Logotype**, click **Upload**.
3. Select the image file in the file system explorer and click **Open**.
4. Click **Save** at the bottom of the page.

See also: [Change your account settings](#)

Change how estimated savings are calculated

i To access these settings, you must be logged in as a member administrator.

Invoice Portal calculates how much money you save when you send and receive invoices electronically. This information is available on different pages, such as the supplier and customer dashboards.

1. Click **Settings** > **Member account**.
2. Under **Estimated savings**, specify your estimation of how much money you typically save by:
 - Receiving each supplier invoice electronically
 - Sending each invoice electronically.
3. Click **Save** at the bottom of the page.

See also: [Change your account settings](#)

Set up sending invoices and invitations

Adjust settings related to sending invoices

i To access these settings, you must be logged in as a member administrator.

The first time you use Invoice Portal, adjust these settings.

1. [Select your currency and rounding method.](#)
2. [Specify your payment method.](#)
3. (Optional) [Use factoring.](#)
4. (Paid subscription) [Integrate with a business system to send invoices.](#)
5. (Paid subscription) [Set up the printing service to send invoices and invitations to non-members.](#)
6. (Paid subscription) [Specify substitution rules for invoices transferred from your business system.](#)
7. (Paid subscription) [Require manual confirmation before sending transferred invoices.](#)
8. [Specify the outgoing email address.](#)
9. Under **Invoice layout**, select the layout type and preview the result in any supported language.
10. [Set the start value for invoice numbers.](#)

See also: [Change your account settings](#)

Select your currency and rounding method

i To access these settings, you must be logged in as a member administrator.

Set the default currency and how amounts are rounded.

1. Click **Settings > Sending**.
2. Under **Currency information**, select the currency.
3. Select which rounding method to use.
 - **Half to even**: This method is commonly used in financial calculations, and halfway values are rounded toward the nearest even number. For example, 165.5 rounds up to 166, whereas 166.5 rounds down to 166.
 - **Half up**: This method is familiar to many, because it is commonly taught in school. For example, 165.5 is rounded up to 166, whereas 165.4 is rounded down to 165.
4. Click **Save** at the bottom of the page.

See also:

[Change your account settings](#)

Specify your payment method


i To access these settings, you must be logged in as a member administrator.

Payment method is included in your outgoing invoices. Invoice Portal can also use this information as a way of identifying you in the system.

Add payment information

1. Click **Settings > Sending**.
2. Under **Payment method**, select the type of payment information, such as IBAN or Bankgiro, on the drop-down menu and click **Add**.
3. Fill in details about that method of payment, such as the name of the bank and the account number.
4. Click **Save** at the bottom of the page.

Delete payment method

1. Click **Settings > Sending**.
2. Under **Payment method**, next to the method of payment to delete, click  **Delete**.

See also:

[Change your account settings](#)

[Use factoring](#)

Set up the printing service to send invoices and invitations to non-members


When is the printing service used?

You can invite non-member [customers](#) or [suppliers](#) by sending them invitations through Invoice Portal. For invitations, you have two delivery options: [by email](#) or by post as described in this section. Email delivery is free but may be not available if you have no email address of that recipient. In this case, you can arrange sending printed out invitations by post. Such delivery costs extra as per item and is available only if you have upgraded your member account to Basic or higher.

The same delivery option is available for invoices. When you [transfer invoices from your business system](#), you can also use the printing service. Postal delivery is reserved only for invoices to non-member recipients who have only a postal address, but no email address specified in their card on your customer list. For more information on how to find your customer data, see [Change customer information](#). For more information on other delivery options, see [Delivery options overview](#).

To make sure you do not print out unnecessary or faulty documents, you can set up manual confirmation, as shown in step 4 in [Enable printing and sending by post](#).

Enable printing and sending by post

 To access these settings, you must be logged in as a member administrator.

Prerequisites

- Member account Basic or higher
- Integrated business system (required for invoices, not required for invitations)

Steps

1. Click **Settings > Sending**.
2. Under **Printing service**, select **Use printing service**.
More options appear.
3. Select **Add invitation/reminder to invoices when printed** to arrange that invitations or reminders are printed out and included in the envelope.
(Optional) Go to **Customers > Invitation text** and **Invitation reminder** to review the text.
4. Select **Require manual confirmation before sending transferred invoice to the printing service** to [queue](#) invoices from your business system before printing.
5. Select **Add attachments to invoices when printed** to arrange that documents attached to the invoice (if any) are printed out and included in the envelope.
6. Select the postage type from the listed options.
7. Click **Save** at the bottom of the page.

See also: [Change your account settings](#)

Specify the outgoing email address

i To access these settings, you must be logged in as a member administrator.

You can specify the email address to use when sending PDF invoices and invitations.


1. Click **Settings > Sending**.
2. Under **Email for PDF invoices**, enter the email address to use.
3. Click **Save** at the bottom of the page.

See also: [Change your account settings](#)

Remove a VAT rate

i To access these settings, you must be logged in as a member administrator.

Value-added tax (VAT) is used when creating invoices and displayed in the **VAT %** drop-down list. When you start using Invoice Portal, this list is empty. VAT rates are added here as you use them on invoices. You can remove excessive VAT rates.

1. Click **Settings > Sending**.
2. Under **Misc**, click **Clear VAT percentage cache**.
The **Clear VAT percentage cache** page opens.
3. Find the value to delete and click  **Delete**.

See also: [Change your account settings](#)

Set the start value for invoice numbers

i To access these settings, you must be logged in as a member administrator.

All invoices have a unique invoice number. These numbers can be set manually per invoice or Invoice Portal can automatically assign each invoice a number that is based on a start value.

1. Click **Settings > Sending**.
2. Under **Misc**, select **Automatically provide next invoice number**.
3. For **Start value**, type a number.
4. Click **Save** at the bottom of the page.



See also: [Change your account settings](#)

Use factoring

i To access these settings, you must be logged in as a member administrator.

If a third party (a so-called factor) handles incoming payments from your customers, you need to add their details to Invoice Portal. This information is included in the invoice if you select **Use factoring** in the **Payment details** section when creating the invoice.


1. Click **Settings > Sending**.
2. Under **Payment method**, select **Use payee/factoring organization information**. The **Factoring organization** section appears.
3. Under **Factoring organization** section, specify the following details:
 - a. Type the name of the company and their address.
 - b. Provide their organization number.
 - c. Add a method of payment:
 - First, select the payment type in the drop-down list and click **Add**. The payment type appears in the list.
 - Second, specify the required information in the fields next to the payment type (if any), such as bank and account number.

 To delete a method of payment, find it in the list and click  **Delete**.

4. Click **Save**.

Set up receiving invoices

Adjust settings related to receiving invoices

 To access these settings, you must be logged in as a member administrator.

The first time you use Invoice Portal, adjust these settings.

1. Click **Settings > Addresses** to [set up recipients, along with your legal and delivery addresses](#).
2. Click **Settings > Receiving**.
3. (Optional) Under **Incoming invoice rejection**, [suspend or disable rejection of incoming invoices](#).
4. Under **File transport**, [specify rules for incoming invoice content and transport](#), including integration with a business system to receive invoices (paid subscription) or an API integration (for users of other Kofax products).
5. (Optional) Under **Invoicing instructions**, write a message to suppliers. For example, these instructions can contain information that you want them to include, such as the cost center. This message is displayed when they create an invoice in Invoice Portal.
6. (Paid subscription) Under **Reference validation settings**, [view and adjust reference values for suppliers](#). These values are used for validation and are individual per every recipient you have.
7. (Optional) Under **Validation of supplier information**, [block and unblock suppliers](#).
8. Click **Save** at the bottom of the page.

See also: [Change your account settings](#)

Configure file transport and delivery address for individual recipients

i To access these settings, you must be logged in as a member administrator.

Under **Settings > Addresses**, you can view, edit, and delete electronic recipients and delivery addresses within your organization as well as [change the legal address](#).

A recipient is a member representative in Invoice Portal that can receive e-invoices through Invoice Portal and has individual receiving settings and an address. By creating a recipient, you can specify individual receiving settings per every branch, department, or office you have, indicating what and how they receive. Such settings include: identifiers, email addresses or other file transport options, invoice format, validation rules and other settings, as described further in this section. If you are not set up to receive invoices, you cannot create recipients, but you can create delivery addresses.

After setting up multiple recipients, you can continue customizing your requirements for incoming invoices per recipient: [set up field validation](#) and [adjust other settings related to receiving invoices](#).

See in this section:

- [Types of entities configured on the Addresses page](#)
- [Use cases with multiple addresses and recipients](#)
- [Types of identifiers in Invoice Portal](#)
- [Set up a recipient](#)
 - [Specify a delivery address](#)
 - [Specify file transport means per electronic recipient](#)
 - [Provide a unique ID for the recipient](#)
- [Change the legal address](#)
- [Edit a recipient](#)
- [Delete a recipient](#)

Types of entities configured on the Addresses page

In Invoice Portal, the following address types are used. For more information on how to configure and manage the types, see the current section. An address can be all three types at once or just one type.

- **Delivery address**
Bears a branch/office name. Included in invoices.
- **Legal address**
Bears the company's legal name. Included in invoices.
- **Electronic recipient**
Also called recipient, it is a member's primary representative in Invoice Portal in terms of receiving electronic invoices.

Delivery address

- Has a name and address fields
- May have unique identifiers

- May be enabled/disabled as a legal address
- May be enabled/disabled as an electronic recipient
- May be enabled/disabled as a delivery address

Legal address

- Is a delivery address enabled as the company's legal address
- May be changed, except the country

Electronic recipient (or just "recipient")

- Includes a delivery address (that may be enabled/disabled as a delivery address or legal address)
- Is enabled as an electronic recipient
- Has file transport settings
- Has unique identifiers

Use cases with multiple addresses and recipients

One member – multiple delivery addresses

Goal: Allocate costs to proper departments and bookkeeping records

Larger companies may need multiple delivery addresses configured per member account. In this case, a supplier, when creating an invoice to such member, can select a delivery address which will be shown in the invoice.

Unlike with configuring electronic recipients, this use case does not involve receiving invoices in multiple business systems/electronic addresses, in different e-invoice formats, and does not require individual identifiers and file transport settings per address. Available with Free membership.

One member – multiple electronic recipients

Goal: Forward incoming invoices to different departments in different formats and by means of different file transport based on identifiers

A company can set up individual recipients with unique identifiers, recipient profiles (rules), and file transport settings. The rules apply to sender countries, information that must be provided by senders, as well as supported, required and validatable fields, and so on.

This use case may involve the use of multiple delivery addresses specified per each recipient.

Free members can have multiple recipients with different email addresses (not recipient profiles).

One electronic recipient – multiple file transport and recipient profile settings

Goal: Customize rulesets to sort incoming invoices based on content

A company may have one electronic recipient with different recipient profiles (rules) and file transport settings configured. Similarly to the case above, incoming invoices are customized and delivered to different electronic addresses/business systems depending on the rules. The invoices must have unique features by which to sort them (for example, by the presence of specific tags).

Unique recipient IDs are not required. Not available with Free membership.

Types of identifiers in Invoice Portal

In Invoice Portal, the following types of identifiers are used to identify electronic recipients of the same member:

- **Official**
Issued by authorities and standardized in the country of issuance and/or internationally.
Examples: **VAT/Tax ID, IBAN, GLN.**
- **Free-form**
Created by a member to forward incoming invoices to designated recipient addresses of this member. Example: **e-ID** or **Other ID** (in the **Identifier type** drop-down list).
Internal reference is not an ID but can be used as an additional means of sorting invoices in a receiving business system.

i Either an official or free-form ID must be specified per electronic recipient. Otherwise, invoices to such recipient will be routed only if sent from the Invoice Portal web interface (but not from an integrated business system).

The GLN is a preferable identifier type as it is internationally recognized. If the recipient's GLN is specified, it significantly reduces the possibility of errors during electronic processing and routing of the invoices to this recipient. However, if you do not have a unique GLN per every recipient office, use other identifiers, either official or free-form.

For free-form IDs, do not specify text with white spaces and new lines as it can cause errors in some business systems.

Along with recipient's unique identifiers, the following identifying information is included in invoices to every recipient:

- [Member identifiers](#)
- [Legal address](#)
- [Delivery address](#)

The member identifiers and legal address are the same for all member's recipients. The delivery address does not affect electronic invoice delivery and processing, and may be the same for different recipients (except the address name). For an electronic recipient, only the identifiers and name need to be unique.

Set up a recipient

A member may configure several recipient offices. Recipient's information consists of:

- Address (which may be a delivery address and/or a legal address)
- (Optional) Unique identifiers
- (Optional) File transport settings

If file transport settings and a [unique identifier](#) are specified, such a recipient can receive invoices via Invoice Portal by means of electronic communication (email, FTP, API) to a separate electronic

address/business system. In this case, the multiple electronic recipients option is used for invoice routing.

An address without file transport settings may not be used for routing or electronic processing of the incoming invoices, but may be used for bookkeeping because it is included in the invoices. Also, when creating an invoice to an Invoice Portal member, the sender can choose what delivery address to specify in the invoice as the buyer address and as the delivery address.

Initially, a member has one recipient based on the data specified during registration. Later, you can set up more electronic recipients or delivery addresses, and change the legal address.

Specify a delivery address

A delivery address is included in invoices sent to a recipient.

1. Click **Settings > Addresses**.
2. To add a new recipient address, click **Add address**.
Fields for a delivery address appear.
3. Specify a meaningful name for the recipient. It will be used by suppliers when creating an invoice to select this entity as either:
 - Electronic recipient of the invoice.
 - Buyer address and/or delivery address, while the electronic recipient's address is different.
4. Fill in the address fields.
5. (Optional) Enter an identifier by which e-invoices are to be routed to this recipient address:
 - Official ID
Select your country. For **Identifier type**, select a type available for your country: **VAT/Tax ID**, **IBAN**, **GLN**, and so on. Specify the respective ID.
 - Free-form ID
Select **Other ID** for **Identifier type** and specify an ID.
OR:
Specify an ID in the **e-ID** field.

i Invoice Portal routes invoices only to the recipients who have a unique identifier and file transport settings. For more information, see in this section [Provide a unique ID for the recipient](#) and [Specify file transport means per electronic recipient](#).

6. Additionally, you can:

- Make this address your legal address.

Select the **Legal address** check box under the address fields and click **Yes**.

- Make this address an electronic recipient. (Available for members who are set up to receive invoices.)

Select the **Recipient** check box under the address fields and provide file transport settings, as shown in this section in [Specify file transport means per electronic recipient](#). Make sure to specify a unique identifier, as shown in step 4.

- Disable displaying the address as a delivery address.

Clear the **Delivery address** check box under the address fields.

This delivery address will not be available for selection when creating an invoice in the Invoice Portal web interface.

7. When you are done, click **Save**.

Specify file transport means per electronic recipient

You can set up multiple recipients that receive electronic invoices directly at the specified electronic address/business system.

i Individual file transport settings replace the "All recipients" configuration [on the Receiving settings page](#) for this recipient.

1. Click **Settings > Addresses**.**2.** To add a new recipient, click **Add address**.

Fields for a delivery address appear.

3. Fill in the address fields as shown in this section in [Specify a delivery address](#).

You may fill in only the required fields. Make sure that an identifier is provided.


If you do not want the address to appear on invoices as a delivery destination, clear the **Delivery address** check box under the address fields.

4. Select the **Recipient** check box to configure how e-invoices are to be delivered to this recipient (file transport means):

- **Not yet ready to receive invoices:** The recipient is active as a member, but suppliers cannot find it in the system, and cannot send it invoices.
- **Receive invoices in web interface only:** Invoices are received through Invoice Portal only.
- **Receive invoices via API integration:** Invoices are received through Invoice Portal and the recipient's applications integrated with Invoice Portal [via API](#).
- **Receive invoices as PDFs by email:** Invoices are received through Invoice Portal and email. Specify the email address in the **Email address** box that opens below.
- **Receive invoices via business system integration:** Specify custom file transport means in addition to Invoice Portal.

i To ensure safe e-invoice delivery, for **Receive invoices via business system integration**, select only the recipient profile and the file transport means agreed with a Kofax Support specialist.

5. If you select **Receive invoices via business system integration**, specify a recipient profile (your system, invoice format, and custom rules) as well as transport means:
 - a. Under **Recipient profile**, select the recipient profile communicated to you by a Support specialist and click **Add**.

The item is added to your list of recipient profiles with the default transportation option. It is possible to use multiple recipient profiles or different file transport means per recipient. For more information on this configuration option, see in this section [Use cases with multiple addresses and recipients](#) or contact Support.
 - b. To change transport settings, click  **Setup** next to the recipient profile. A **Transportation setup** dialog box opens.
 - c. Select a file transport option to use for receiving invoices according to the selected recipient profile:
 - **Email** and specify the email address.
 - **FTP** and specify the **FTP server***, **Port***, **Username***, **Password***, and other FTP settings as necessary.
 - Click **More details** and for **Operator**, select an eDelivery network.


Click **OK** and proceed to step 9 or continue configuring the recipient.
6. Specify **Envelope ID**, the respective country, and identifier type, if this ID is required by your operator. **Envelope ID** is added automatically to the header of invoices transferred to your operator through Invoice Portal.
7. (Optional) Under **Invoicing instructions**, write a message to suppliers.

This text is displayed on top of the web page for creating an invoice, so that suppliers can read it first. These instructions usually contain information that you want to be included in invoices, such as the cost center.
8. (Optional) For **Internal reference**, provide text that will help you link incoming invoices to this particular recipient.

It may be used to sort incoming invoices. You do not have to ask suppliers to fill in this field, as it is done automatically when an invoice is transferred to you through Invoice Portal.
9. Click **Save**.

Provide a unique ID for the recipient

E-invoices are routed to recipients by means of identifiers. For more information about required recipient identifiers, see in this section [Types of identifiers in Invoice Portal](#).


1. Click **Settings > Addresses**.
2. Double-click a recipient or click  **Edit** next to it.

A page with the recipient's settings opens.

3. To identify an electronic recipient, specify either or both:
 - Official ID
Select your country. For **Identifier type**, select a type available for your country: **VAT/Tax ID**, **IBAN**, **GLN**, and so on. Specify the respective ID.
 - Free-form ID
Select **Other ID** for **Identifier type** and specify an ID.
OR:
Specify an ID in the **e-ID** field.
4. Make sure valid [file transport settings](#) are provided.
5. Click **Save**.

Change the legal address

You can change your previously specified legal address, except the country, as it must be the same.

 The name in the new legal address will be used as your company's legal name and member name in Invoice Portal.

Variant 1

1. Click **Settings > Addresses**.
2. In the list, select a recipient whose address you want to use as the legal address.
3. Click **Update legal address**.
The previous legal address is replaced with the selected recipient's address.


Variant 2

1. Click **Settings > Addresses**.
2. Double-click a recipient address to use as the legal address.
A page with the recipient's settings opens.
3. Select the **Legal address** check box under the address fields and click **Yes**.
4. Click **Save**.
The previous legal address is replaced with the selected recipient's address.

Edit a recipient

Member accounts are created with at least one electronic recipient. Later, you can add more recipients and change their configuration.

You can edit member's settings on the **Member account** page, **Receiving** settings page, and, for senders, on the **Sending** settings page. You can edit specific recipient's settings on the **Addresses** page and **Receiving** settings page (file transport and reference validation).


1. Click **Settings > Addresses**.
2. Double-click a recipient or click  **Edit** next to it.
A page with the recipient's settings opens. Edit the settings as shown in this section.
3. [Edit the delivery address](#).

4. Add or edit the file transport settings.
5. Add or edit recipient's identifiers.
6. Click **Save**.

You can also [select the recipient's address as the legal address](#).

Delete a recipient

i You cannot delete a recipient whose address is used as the legal address. [Assign another legal address](#) first, as shown in this section.

1. Click **Settings > Addresses**.
2. Click  **Delete** next to the recipient you want to delete.
The recipient is deleted without recovery.
3. Click **Yes** to confirm.

Specify rules for incoming invoice content and transport

i To access these settings, you must be logged in as a member administrator.

Under **Settings > Receiving > File transport**, you can specify an incoming invoice format and recipient profile, file transport means, and more specific rules for every recipient you have set up in Invoice Portal.

Summary of invoice delivery with Invoice Portal

- General electronic delivery: web interface and email.
- Custom electronic delivery is available with Basic membership or higher. Includes: API, FTP/SFTP, and partner operator networks.
- General incoming invoice format: PDF based on Esxml2.
- Other e-invoice formats are available with Basic membership or higher.
- Supported e-invoice formats can be further fine-grained to meet your needs by means of configuring a recipient profile.
- To customize the delivery of incoming invoices per recipient or for all your recipients, contact Support under **Support > Request**.

See also: [Adjust settings related to receiving invoices](#)

Specify invoice content requirements

1. Click **Settings > Receiving**.
2. Scroll to the **File transport** section.

3. Select any single recipient (not **All recipients**).

i If you change **File transport** settings and save them with **All recipients** selected, any existing **file transport means** for *individual* recipients are overwritten with file transport means specified for *all* recipients.

4. Select the check boxes for **Invoice content**:

- **Prevent duplicate invoice numbers within same year:** Select to check whether the supplier has already sent an invoice with the same invoice number during the previous 12 months.
- **Append attachments to PDF documents:** Select to include attachments content in the invoice file when it is generated as a PDF. This may be needed in three cases. Firstly, some recipients set up receiving invoices as PDF files to their email address. Secondly, if the recipient profile supports it, some recipients set up receiving invoices both in XML and PDF formats. Thirdly, when viewing an invoice in the web interface, any authorized user can save it as a PDF file (see [Create an invoice](#)).
- **Attach original documents, too:** When the previous option is enabled, select to include attachments also in their original format, such as a Microsoft Word document.

5. Click **Save** at the bottom of the page.

Important If you have changed the settings with "All recipients" selected and have more than one recipient, Invoice Portal asks you to confirm the action.

If you want to propagate "All recipients" file transport settings to individual recipients, click **Yes**. If you want to keep individual file transport settings and save the selections for invoice content, click **No**. "All recipients" file transport settings will not be propagated and will be saved only for "All recipients" as an entity with individual settings.

Specify file transport means

1. Click **Settings > Receiving**.
2. Scroll to the **File transport** section.
3. On the list, select the correct recipient:

- **All recipients** to specify the same file transport means for all your recipients.

i If you change **File transport** settings and save them with **All recipients** selected, any existing file transport means for individual recipients are overwritten with file transport settings for all recipients.

- Single recipient to specify individual settings for this recipient.

To find a recipient on a long list, type part of its name, address, ZIP code, city, or country in the **Filter recipients** search field. You can type multiple search values.

Matching recipients are shown.

4. Specify **File transport** settings to prescribe how the selected recipient or all recipients receive invoices. The same per individual recipient can be done [on the Addresses tab](#).
 - **Not yet ready to receive invoices:** The recipient is active as a member, but suppliers cannot find it in the system, and cannot send it invoices.
 - **Receive invoices in web interface only:** Invoices are received through Invoice Portal only.

- **Receive invoices via API integration:** Invoices are received through Invoice Portal and the recipient's applications integrated with Invoice Portal [via API](#).
- **Receive invoices as PDFs by email:** Invoices are received through Invoice Portal and email. Specify the email address in the **Email address** box that opens below.
- **Receive invoices via business system integration:** Specify custom file transport means in addition to Invoice Portal.

i To ensure safe e-invoice delivery, for **Receive invoices via business system integration**, select only the recipient profile and the file transport means agreed with a Kofax Support specialist.

For more information on **Receive invoices via business system integration**, see [Specify file transport means per electronic recipient](#), step 5.

5. Specify **Envelope ID** and the respective country and identifier type, if this ID is required by your operator. **Envelope ID** is added automatically to the header of invoices transferred to your operator through Invoice Portal.
6. (Optional) Under **Invoicing instructions**, write a message to suppliers.
This text is displayed on top of the web page for creating an invoice, so that suppliers can read it first. These instructions usually contain information that you want to be included in invoices, such as the cost center.
7. Click **Save** at the bottom of the page.
Important If you have changed the settings with **All recipients** selected and have more than one recipient, Invoice Portal asks you to confirm the action.
If you want to propagate "All recipients" file transport settings to individual recipients, click **Yes**. If you want to keep individual file transport settings and save the selections for invoice content, click **No**. "All recipients" file transport settings will not be propagated and will be saved only for "All recipients" as an entity with individual settings.

Suspend or disable rejection of incoming invoices

i To access these settings, you must be logged in as a member administrator.

By default, incoming invoices that do not match your receiving settings are rejected. Some senders receive notifications about the rejection, some do not. You can customize how to handle faulty incoming invoices by suspending or disabling their automatic rejection.

1. Click **Settings > Receiving**.
2. Under **Incoming invoice rejection**, select the following settings as necessary.
 - **If the sender cannot be notified**, you can enable automatic or delayed acceptance.
 - Select **Accept automatically without delay** to receive all invoices.

- Select **Disable automatic acceptance of invoices (not recommended)** to never automatically accept invalid invoices.

i Select this option if you plan to manually handle invalid incoming invoices in the Rejected queue. By selecting this option, you agree that you understand that such invoices will not be delivered to you. Also, the sender will not be notified that you have not received the invoice, unless you manually handle it in the Rejected queue. If you plan to clear the **Disable automatic acceptance of invoices** check box later, all your pending invalid invoices will require manual handling in the Rejected queue.

- Type the number of days in **Days until auto-accept** to set the review period after which rejected invoices will be accepted.
- **If the sender can be notified**, you can suspend automatic rejection.
 - Select **Enable management of stopped invoices before sender is notified** to suspend rejection.
 - Type the number of days in **Days until auto-reject** to set the review period after which invoices will be rejected.

Use reference values for validation

i You can use field validation only if your recipient profile supports it. For more information about recipient profiles in Invoice Portal, see [Configure file transport and delivery address for individual recipients](#).

Incoming invoices may be validated using reference values in specific fields. For example, you communicate to suppliers that their invoices to you must have this value (or a range of values) in a certain field. Then you specify this setting in Invoice Portal. Invoice Portal checks whether the reference values are provided in the field or fields to be validated. If such values are incorrect or missing, the invoice sent to you is rejected. You can specify different field validation rules per every recipient office you have set up in Invoice Portal.


1. Click **Settings > Receiving**.
2. Under **Reference validation settings**, click **Edit**.
The **Reference validation settings** page opens.
3. Select a recipient within your organization for whose incoming invoices you want to set field validation.
Information about the recipient's operator, the recipient profile, and existing references (if any) is shown.
4. Under **Choose validatable field**, select the applicable field name.
The drop-down list displays only field names available under your recipient profile.
5. Under **Type of reference validation**, select one of the following options:
 - Select **Reference list** to provide a list of values that are allowed in the validatable field.
 - a. Click **Add reference** at the bottom of the page. Specify the reference value, provide a description and click **Save**.
 - b. Repeat the step, if necessary, to provide more values.
Invoices without one of the provided values in this field will be rejected.

- c. Select **Apply auto correction of references on incoming invoices** to allow Invoice Portal to isolate content that matches any reference value from the rest of the text in the field. Otherwise, invoices that contain extra text along with a correct value will be rejected.
 - d. Select **Use case-sensitive reference validation** to enforce rejecting invoices with reference values containing text in the wrong letter case, for example, "amy watts" instead of "Amy Watts".
 - Select **Pattern rule** to verify input in the validatable field according to a rule.
 - a. Type a regular expression.
 - b. Click **Save**.

Invoices in which the validatable field value does not satisfy the rule, will be rejected.
 6. To add validation to more fields, if available in your recipient profile, follow the preceding instruction to set up **Choose validatable field** and **Type of reference validation**.
 7. When you are done, click **Save**.

The validation values or rules are applied immediately after saving.


Block and unblock suppliers

 To access these settings, you must be logged in as a member administrator.

All invoices sent to you are checked against your list of blocked suppliers. If you block a supplier and they try to send you an invoice, they receive a message "You are blocked as a supplier by the receiving member." The invoice is then saved to drafts. Nonetheless, invoices transferred from business systems may still come through. At the recipient side, they are suspended and stored [on the Rejected tab](#).

Restrict invoice senders (create a white list)

You can enable receiving invoices only from the suppliers you have added. To view the list of your suppliers, go to **Suppliers > Summary** and click **Check and update**.

 We recommend using a white list only in very specific security-driven cases. Using a [black list](#) is less error-prone.

1. Click **Settings > Receiving**.
2. Under **Validation of supplier information**, select **Receive invoices only from suppliers whose identifier or payment method are on your supplier list**.

Suppliers not on your list will not be able to send you invoices through Invoice Portal.
3. Click **Save** at the bottom of the page.


Block suppliers (create a black list)

1. Click **Settings > Receiving**.
2. Under **Validation of supplier information**, click **Click here**.

A page with the list of your blocked suppliers opens.


3. Click **New line**.
4. Select the country and identifier type, then enter the supplier's identifier in the **Identifier** field. For example, if you select organization number as the identifier type, then type that number.
5. (Optional) Specify payment information. First select the payment type, then provide the account number.
6. (Optional) Type the reason why you are blocking the supplier. This message is not displayed to the supplier.
7. Click **Save**.

Unblock suppliers

1. Click **Settings > Receiving**.
2. Under **Validation of supplier information**, click **Click here**.
A page with the list of your blocked suppliers opens.
3. Under **Blocked suppliers**, find the supplier to unblock and click the **Delete** button .
4. Confirm that you want to unblock the supplier by clicking **Yes**.

Integrate with your business system

Receive invoices via a business system integration


 To access these settings, you must be logged in as a member administrator.

You can request that your invoices are received in your custom or standard e-invoice format. Contact Kofax Support under **Support > Request**.

For more information on the integration settings, see **Receive invoices via business system integration** in:

- [Specify file transport means per electronic recipient](#), step 5 (**Settings > Addresses**)
- [Specify rules for incoming invoice content and transport](#) (**Settings > Receiving**)

Receive invoices via an API integration

 To access these settings, you must be logged in as a member administrator.

If you use other Kofax products, you can set up receiving invoices from Invoice Portal into these products.

If you do not know your credentials to access the API as an administrator, contact Support under **Support > Request**.

1. Use the [Update a member](#) endpoint to set the `apiEnabled` property to `true`. For API-created members, it is already set to `true`.
2. Log in to Invoice Portal as an administrator.

3. Click **Settings > Receiving**. Under **File transport**, select a recipient or **All recipients**.
4. Select **Receive invoices via API integration**.
5. Click **Save** at the bottom of the page.

You will receive invoices for the selected recipient(s) both in the web interface and by calling the Invoice Portal API at <https://web.invoiceportal.net/> (base URL).

Transfer invoices from a business system via Invoice Portal

i To access these settings, you must be logged in as a member administrator.

You can connect your ERP system or an eDelivery operator to start using Invoice Portal as a hub transferring invoices to recipients. Request Kofax Support to configure such an integration. Click **Support > Request**. If you are a Free member, you need to [upgrade your membership level](#) to be able to integrate your business system with Invoice Portal.

1. Click **Settings > Sending** and scroll to **Integration with a business system for sending**.
2. [Specify substitution rules for invoices transferred from your business system](#).
3. For **Business system/format**, select which business system or format you use. Fields for file transport settings become available.
4. Under **Fetch files from**, select how to retrieve the files: email or FTP.
 - a. Specify the settings for the **Email account (POP)**:
 - **Server**: Type the email server address.
 - **Port**: Select the email port number. Standard is 110. If secure sockets layer (SSL) is used, standard is 995.
 - **Username**: Type the user name for your email account.
 - **Password**: Type the password for your email account.
 - **SSL**: Select to enable SSL (encryption).

i This email account must be used for emails containing invoices only. Do not add an account used for other emails, as Invoice Portal will fetch and delete all emails from the account.

- b. Or specify the settings for the **FTP account**:
 - **Server**: Type the FTP server address.
 - **Port**: Select the FTP port number. Standard is 21 for direct FTP connections, and 22 is standard for SSH File Transfer Protocol (SFTP).
 - **Username**: Type the user name for your FTP account.
 - **Password**: Type the password for your FTP account.
 - **Path on FTP server**: Specify the path to the folder where the files are to be retrieved.
 - **File name pattern**: Specify whether any specific types of invoices are to be retrieved from the folder. For example, to only retrieve XML invoices, type *.xml. If this box is left empty, all files are retrieved.
 - **FTPS security method**: Select a method.
 - **Secure FTP/SFTP**: Select to enable SFTP (encryption).

- **Binary mode:** Select to enable binary mode, which means the transferred data is not converted but sent as a direct stream. If this option is not selected, ASCII transfer is used instead, which means that all data is first converted to text characters and then the data is converted back when it reaches the recipients.
 - **Remove file after polling:** Select to delete files after they are transferred to Invoice Portal. Note that this requires that the user has the necessary file permissions.
 - **Passive mode for transfer:** Select to enable passive mode, which allows direct transfer without any further configuration. We recommend that you select this setting.
5. Under **Email address to send error notifications to**, enter the email address to use when sending notifications that there are problems with a transfer.
 6. Click **Save** at the bottom of the page.

Specify substitution rules for invoices transferred from your business system

i To access these settings, you must be logged in as a member administrator.

When setting up the transfer of invoices from a business system to Invoice Portal, define how specific pieces of data are to be handled.

For example, your business system creates a file to send to Invoice Portal. For some reason, the business system cannot add a Bankgiro account. You can alter the transfer settings so that all your invoices being transferred and sent through Invoice Portal include the Bankgiro account number, which is retrieved from your Invoice Portal details. In this example, you set Supplier Bankgiro (Sweden) to Always.

1. Click **Settings > Sending**.
2. Click the **Click here** link.
The **Substitution rules for invoices from your business system** page opens.
3. Go through the list of fields and select whether to replace the data in the files transferred from your business system through Invoice Portal.
 - **Always:** The data in the incoming file is always replaced by your data specified in Invoice Portal. If Invoice Portal does not have any data for a field, the data is removed from the inbound file.
 - **If missing:** If the inbound file has data for a field, no action is taken. If there is no data in the inbound file, the data from the Invoice Portal field is added.
 - **Never:** The data in the inbound file is never changed.
4. Click **Save**.

Unit translations

When setting up the units of measurement for your invoices imported to Kofax Invoice Portal, in Unit translation, you can replace the original value with the appropriate unit value. For example, for the business reasons, you may need to replace the STK unit for an item ("styck" means "piece" in Norwegian) with EA (according to the UN/ECE codelist).

Require manual confirmation before sending transferred invoices

i To access these settings, you must be logged in as a member administrator.

You can set up Invoice Portal so that invoices created in your business system and transferred to Invoice Portal require manual confirmation before being sent to customers. These invoices are first sent to the invoice queue. From there, you send them to your customers. To access the invoice queue, click **Invoice > Queued**.

There are three [delivery options](#) available. You can enable queuing by any of the delivery options:

1. Click **Settings > Sending**.
2. Under **Misc**, select the appropriate check boxes:
 - **Require manual confirmation before transferred invoice is sent as an e-invoice**
 - **Require manual confirmation before transferred invoice is emailed as a PDF**
3. To enable manual confirmation of invoices to be sent to the [printing service](#), scroll up to **Printing service**. If the option is available and enabled, make sure that **Require manual confirmation before sending transferred invoice to the printing service** is selected.
4. Click **Save** at the bottom of the page.

See also: [Change your account settings](#)

Allow access via API

i To access these settings, you must be logged in as a member administrator.

To enable integration between another business system or program and Invoice Portal, contact Support. Then, to allow access to your specific Invoice Portal account data through REST API, perform the following actions.

1. Under **Allow access via API**, click **Create integration**.
2. Copy the API secret keys and store them securely. You will not be shown these keys again.
3. Click **Save**.
You can now view the state of your integration.
4. If you need to reconfigure or deactivate your integration, click **Delete** for your active integration.

See also: [Change your account settings](#)