




User Guide for PEPPOL Users

 **b2brouter**

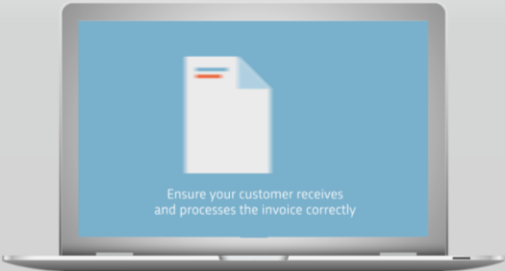
Services Prices How it works

Sign up Log in


Electronic invoicing

Easy, accredited, secure, affordable

Generate an electronic invoice




Ensure your customer receives and processes the invoice correctly




Manage your electronic invoicing with ease

Generate electronic invoices online faster and track them from any device.



Import and recognise data on your invoices in PDF format

Scan or import your invoices in PDF format with our automatic invoice recognition function.



Send electronic invoices online to your customers

Increase your efficiency by sending electronic invoices to companies and public entities.

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Getting Started

Section 1 - Preparation

The invoices you send to your customers via PDF will include your Company Logo and your bank details, so it is helpful to have these ready when you go through the account registration process.

In order to set-up your bank details on B2B Router you will need to obtain your IBAN and BIC/SWIFT numbers from your bank.


Alternatively, there is an IBAN and BIC/SWIFT code search function provided at:

http://www.ibancalculator.com/bic_und_iban.html

For your company logo you will need to have a JPEG, GIF or PNG file saved on your system ready to upload during the Invoice set-up process.

For access to the PEPPOL network you need to subscribe to the Business plan. You can check our '**Premium Plans**' for an overview of the choices available to you.

This user guide focuses on the Business Plan, which provides a platform for the electronic exchange of PEPPOL-compliant orders and invoices, and a facility for managing all of your eBusiness activities.


[Services](#)
[Prices](#)
[How it works](#)

[Sign up](#)
[Log in](#)

We have a plan for you: improve your electronic invoicing.

From sending free electronic invoices to integrating your billing system or ERP with B2B Router.

Free

Basic

Basic billing with PEPPOL

- + 1 company / 1 user
- + 1 bank account to receive payments.
- + Unlimited submission of electronic invoices.
- + Send invoices to the PEPPOL international network.
- + On-line storage of sent invoices for 3 months.
- + Delegated signature of your invoices, without the need of your own certificate.

[Sign up](#)

£99/yearly

Professional

For professionals or freelances

In addition to the features of the Basic plan

- + Up to 2 users per company
- + Multiple Company bank accounts.
- + Importing and exporting of master files and invoices
- + Electronic signature with your own digital certificate
- + File attachments
- + On-line storage of sent invoices for 7 years.
- + Notifications through our mobile app.
- + Creation of mandates and SEPA direct debit
- + Online support

[More Information](#)

£265/yearly

Business

For SMEs or low volume suppliers

In addition to the features of the Professional plan

- + Manage up to 5 companies with the same owner (each company must have its own plan).
- + Access for up to 10 users in your Company.
- + Send to and receive from the PEPPOL international network.
- + Registration on the PEPPOL network for receiving invoices and orders (Achieve NHS eProcurement requirements).
- + Importing invoices and orders in XML or CSV.
- + One-click flip from order to invoice.
- + Send to and receive from other private networks.
- + Priority online support.

[More Information](#)

According to transaction volume

Enterprise

For companies with high transaction volumes

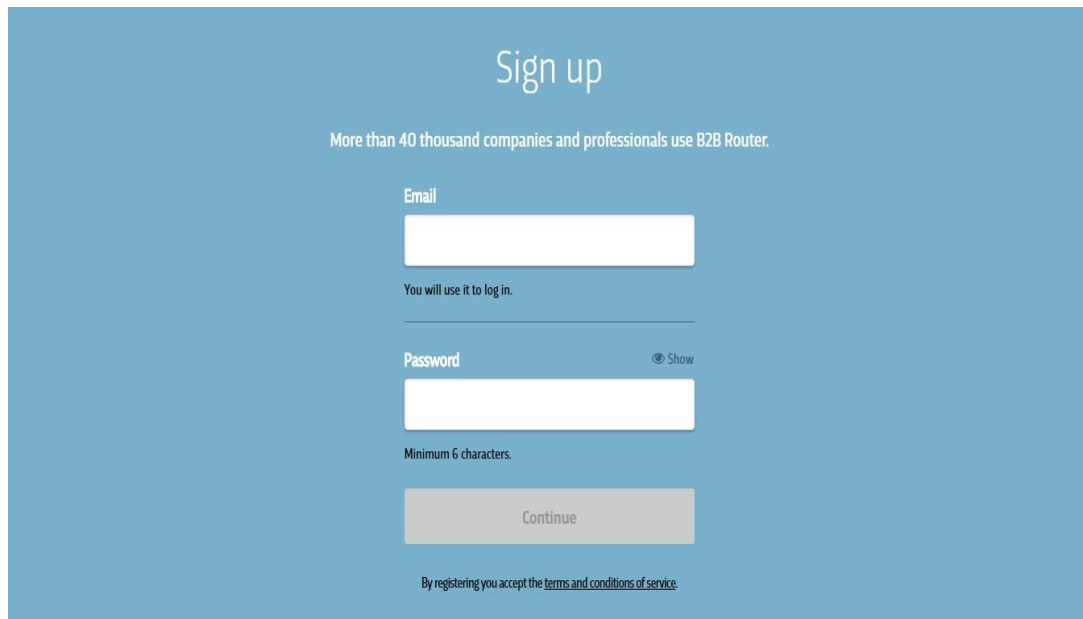
In addition to the features of the Business plan

- + Manage unlimited companies with the same user.
- + Unlimited users per company.
- + Bulk import and export of invoices, orders and status information.
- + Integration with your ERP or billing system through API (Sage, SAP, MS Dynamics ...)
- + Multi-format and multi-standard billing (EDI, CSV, XML...)
- + Receive invoices from different channels.
- + Apply business rules to received invoices.
- + Customized portal form to receive invoices from your suppliers.
- + Apply business rules to received invoices.
- + Exclusive support with an account manager.

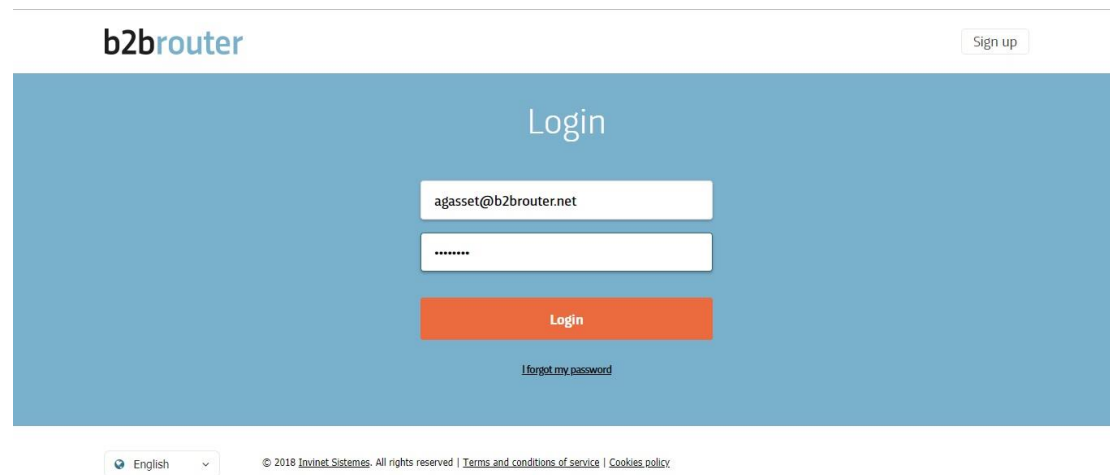
[More Information](#)

Section 2 - Registering your details

1. Go to: <https://www.b2brouter.net/>
2. From the Home Page, click on the 'Sign-up' button. A form will appear where you can enter login user information and proceed to '**Sign-up**'. The email address you enter will be used to send you an activation email. Please note, you can only register one account to any email address.

The image shows a 'Sign up' form on a blue background. At the top, it says 'Sign up' in white. Below that, it says 'More than 40 thousand companies and professionals use B2B Router.' The form has two input fields: 'Email' and 'Password'. The 'Email' field is a white rectangle. Below it, it says 'You will use it to log in.' The 'Password' field is a white rectangle. To the right of the 'Password' field, there is a small eye icon and the word 'Show'. Below the 'Password' field, it says 'Minimum 6 characters.' At the bottom of the form, there is a grey button labeled 'Continue'. Below the button, it says 'By registering you accept the [terms and conditions of service](#)'.

3. Once you have completed the details, click the '**Continue**' button at the bottom of your screen. This will initiate the account activation email.
4. When you receive the account activation email (please always check your Spam Folder if you don't receive the email), click on the activation link. This will take you to the log-on screen.
5. Enter your **email and password** to sign into the B2B Router portal – see below.



Once you have logged on you will see a main menu with 7 sections. As you click on each section you will see a sub-menu of different functions, which includes some of the areas you need to set-up next.

There are two additional sections.

‘Configure’ - to set up your company and ‘Support’ - to request support.

Go to:

Main Menu: **Configure**

Option: **Fiscal Data**

Please see a completed page below with **sample data** completed for your company.

The screenshot shows the 'Fiscal data' form in the B2B Router application. The form is titled 'Fiscal data' and has a 'Required data' label. It contains the following fields and values:

- Company Name (or Name – if individual): * B2B Router
- VAT ID Number: * ESY3514797C (with a link to 'Request change of VAT ID')
- Logo: (with a 'File' button and a preview of the 'b2brouter' logo)
- Address: Ribes 31
- Postcode: * 08192
- City: Barcelona
- Region/Province/County:
- Country: * Spain
- Currency: * EUR - Euro
- Contact person: Full name
- Email: * agasset@b2brouter.net
- Phone: * 676583453
- Website:

At the bottom right, there are 'Cancel' and 'Save' buttons.

Fill in your Company details and please make sure to enter your **VAT ID Number**.

Select currency.

For **your logo**, a JPEG, GIF, or PNG file can be uploaded. The logo will be included in any invoices you create on B2B Router, and will also be visible in the top left-hand corner of many of the screens while you are logged onto the system.

For Taxes, it is possible to specify additional **VAT types** or rates (for example if you have a specific exemption).

When the page has been completed, please **save** your screen. After saving, you will see your own Country VAT rates have populated the tax section of the screen (below).

Configure Hola

Subscription
Fiscal data
Taxes
Bank info
Connections
Customization
Branches
Users

Taxes

Your country taxes will be created by default

Name	%	Default	Category	
VAT	20.0	<input checked="" type="checkbox"/> Default	Standard	
VAT	5.0	<input type="checkbox"/> Default	Low Rated	
VAT	0.0	<input type="checkbox"/> Default	Zero Rated Supply	

[Add new tax](#)

[Cancel](#) [Save](#)

Go To:Menu: **Configure**Sub-Menu: **Bank Info**

Bank info

Insert bank accounts you will use in your invoices

Name	Bank account	BIC	
ES83125503628436350729	IBAN	ES8312550362843635072926	
	Bank account	Bank account	

[New bank account](#)

[Cancel](#) [Save](#)

Please enter your bank name, IBAN number and BIC/SWIFT number (X's are used here to show you the expected length of these numbers), and save the screen.

If you don't have IBAN, you can use a bank account.

Go To:Menu: **Configure**Sub-Menu: **Customisation**

In this screen you can choose your preferences for email notifications, for PDF copies of invoices, and for the language you wish to receive correspondence in. Please see the sample below.

Subscription

Fiscal data

Taxes

Bank info

Connections

Customization

Branches

Users

Customization

Email notifications

Issued invoices:

factures@b2brouter.net

Received invoices:

Orders:

SII imported:

SII sent:

SII state changes:

☐ Process PDF automatically

Invoice viewer:

View original

Discounts:

As %

Roundings:

Round half up

☐ Round before sum

PDF customization:

Default template

Email customization ⓘ

Language:

English

Subject:

Electronic invoice number @invoice.number

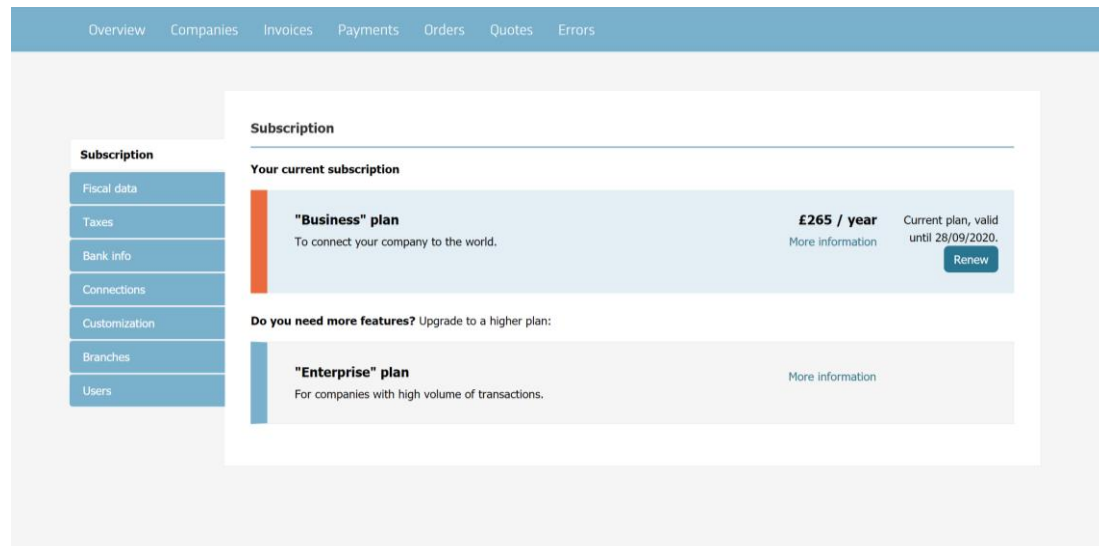
Body:

This invoice has been sent from <https://www.b2brouter.net/>
You can see it here: @invoice_url

After choosing your preferences, please save your changes at the bottom of the screen.

Section 3 - Upgrade Plan

Next, please go to Subscription.



Select the Business plan from the list.

Click on the 'purchase' button in the Business Plan box.

This will take you to a **Payment Information Screen** (below) where you can choose your **Plan type** in the dropdown list in the top right-hand corner. In this case **choose 'Business'**.

The screenshot shows the 'Premium subscription' payment screen. It features a table with the following data:

Description	Amount
Subscription to Business - £265.00 yearly	£265.00
	£265.00
Total	£265.00

On the right side, under 'Payment method', there are three radio button options: 'Credit card' (selected), 'Direct debit', and 'Bank transfer'. A 'Pay' button is located at the bottom right.

Next you can choose your payment type (see the 3 blue boxes above for Credit Card, Direct Debit, and Bank Transfer).

When **Credit Card** is chosen, the following screen appears and you can **select your language 'English'** in the dropdown box in the **top right-hand corner** of your screen.

The screenshot shows a web interface for paying a subscription. At the top is a navigation bar with links: Overview, Companies, Invoices, Payments, Orders, Quotes, and Errors. Below this is a breadcrumb trail: ← Pay subscription by credit or debit card. The main content area is divided into two columns. The left column, titled 'Credit or debit card data', contains form fields for: Name (Full name printed on the card), Card number (1234 1234 1234 1234), MM / YY (Expiration date), and CVV (Verification number located on the back of the card). The right column, titled 'Yearly subscription plan Business' (From 11/10/2018 to 10/10/2019), shows a table with Amount (£265.00) and VAT 0.00 % (£0.00). Below this table, the 'Total amount' is £265.00. At the bottom of the right column is a green button labeled 'Pay £265.00'.

Next, enter your card details and click on **'Pay'**.

Once your payment has been received, you will receive an automated email from the system with a link to the PDF invoice/receipt for your annual fee, for you to download.

If **Direct Debit** is chosen as the Payment Method:

The screenshot shows a three-step process for paying via direct debit. Step 1, 'Enter your IBAN', has a field for IBAN (marked with a red asterisk) and a note: 'Payments will be charged on the bank account reported in your customer profile'. Step 2, 'Download mandate', has a 'Mandate:' label, a 'Download' button with a download icon, and a note: 'Once downloaded, sign it.' Step 3, 'Upload signed document', has a 'Signed mandate:' label, a 'File' button with a file icon, and a note: 'The quickest way is to use an app to scan the signed document from your smartphone.' At the bottom left is a 'Cancel' link, and at the bottom right is a large blue 'Send' button.

First enter **your IBAN** number.

Then download the mandate and sign it.

Scan the mandate and save it on your system.

Upload the signed document using the browse function to locate it on your system.

When the document is uploaded, click on the **'Send'** button

If **Bank Transfer** is chosen as the payment method:

1
Please, make a bank transfer with the following data.

Recipient: INVINET SISTEMES 2003, S. L.
IBAN: ES3021000829000200765465
Concept: BUSINESS B2BROUTER

[Cancel](#)

2
Upload document

Receipt:

[+ File](#)

Scan the receipt for transfer or save it in pdf format and send to us.

[Send](#)

Please make the transfer through your online banking system (if international payments functionality is allowed), using the recipient and IBAN details as above. Download the transfer confirmation document (usually a PDF) and save it to your system.

Upload the document using the **Browse** function and click on the '**Send**' button.

Section 4 - Your PEPPOL Details

Setting up your PEPPOL Endpoint ID

All buyers and suppliers who receive electronic documents within the PEPPOL network need to assign themselves a PEPPOL Endpoint ID. This ID needs to be a type of number that uniquely defines your organisation and one that is accepted in the PEPPOL policy for identifiers. The most commonly used are either a GS1-GLN or a VAT ID. The NHS prefers that the GLN (Global Location Number) is used, so please use that if you have one.

Important: You need to have subscribed to the Business Plan to configure your PEPPOL connection.

Go To:

Main Menu: **Configure**

Sub-Menu: **Connections**

The screenshot displays the 'Connections' configuration page. On the left is a sidebar with menu items: Subscription, Fiscal data, Taxes, Bank info, Connections (highlighted), Customization, Branches, and Users. The main area is titled 'Connections' and features a 'PEPPOL' section. In this section, 'Peppol Scheme ID' is a dropdown menu currently showing 'GLN - EAN International', and 'Peppol Endpoint ID' is a text box containing '0123456789'. Below the PEPPOL section is the 'SMTP - Outgoing mail server' configuration, which includes fields for SMTP server, Port (set to 25), From, Username, Password (with a 'Show' toggle), and a checked 'Use SSL' checkbox. The bottom section is 'IMAP - Incoming mail server', which has an IMAP server field.

A list of connection types will appear. You need to fill in the **PEPPOL** section.

Under **PEPPOL Scheme ID** – enter your **PEPPOL Endpoint Identifier Type**. From the dropdown list choose 'GLN - EAN International' (as per screen shot above)

Under **PEPPOL Endpoint ID** – enter your **PEPPOL Endpoint ID number**

Scroll to the bottom of the page and click on the '**Save**' button to complete the set-up.

Your set-up is complete - you're ready to go!

How to use B2B Router

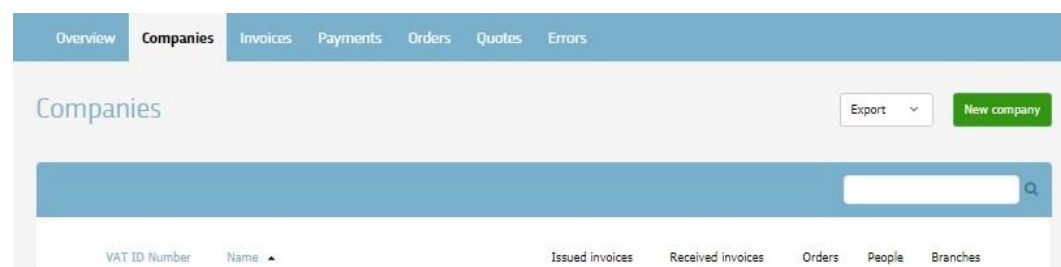
Section 5 – Setting up your Customers

Before you start setting up your buyers you will need to have some details, including your customer's VAT ID number and their company registration number, if you want to include these details on the invoice. You will also need to know your customer's **PEPPOL Endpoint ID Type and Endpoint ID Number** to complete this form, in order for B2B Router to locate your client correctly in the PEPPOL network. You can obtain this information by contacting your customer directly.

Go To:

Main Menu: **Companies**

The following screen will appear.



Next, in the form, click the green box called '**New Company**', where you will find a similar screen to the one you completed to set-up your own company.

In the screen you will see the following (sample data used):

VAT ID Number: GB238769991

Company Name (or Name – if individual): UK Hospital Trust Company

Address: Any Avenue

Postcode: NW1 1TS

City: London

Region/Province/Country:

Country: United Kingdom

Language: English

Contact person: Full name

Department:

Email: LHT@gmail.com

Phone:

Website:

Payment method

Payment: Payment method: Select, Currency: EUR - Euro, Term: Select

Bank info: Account type: IBAN, IBAN Code, BIC

CCC to IBAN converter

Sending and receiving electronic documents (invoices, budgets ...)

Method of delivery: PEPPOL

Peppol Scheme ID: GB-VAT - United Kingdom VAT number

Peppol Endpoint ID: 238769991

[Cancel](#) [Save](#)

Remember to add the 2-letter character code in front of the VAT ID number, if you use a register number from a non-European Community country (e.g. **CH** for Switzerland).

Choose your customer's currency.

Important: In the 'Method of delivery' for receipt documents from this portal choose: '**PEPPOL**' - as this is the format you are **sending** invoices and other documents in.

Bank Info: No need to fill this in, as you are the payment receiver in this case.

Under the **PEPPOL Scheme ID**, choose the type of **PEPPOL Endpoint Identifier type** that your customer is using from the dropdown list. In the UK it is most likely to be '**GLN - EAN International**'

In the **PEPPOL Endpoint ID** field, enter the **PEPPOL Endpoint ID Number** (do not include any 4-digit prefix).

Click on the '**Save**' button to complete the customer set-up and you will see a screen like the one below (created with sample data).

[Overview](#) [Companies](#) [Invoices](#) [Payments](#) [Orders](#) [Quotes](#) [Errors](#)



[←](#) UK Hospital Trust Company

[Edit](#) [Delete](#) [←](#) [→](#)

UK Hospital Trust Company  Not linked

Any Avenue
NW1 4T9S London
United Kingdom

VAT ID Number: GB238769991
Method of delivery: PEPPOL

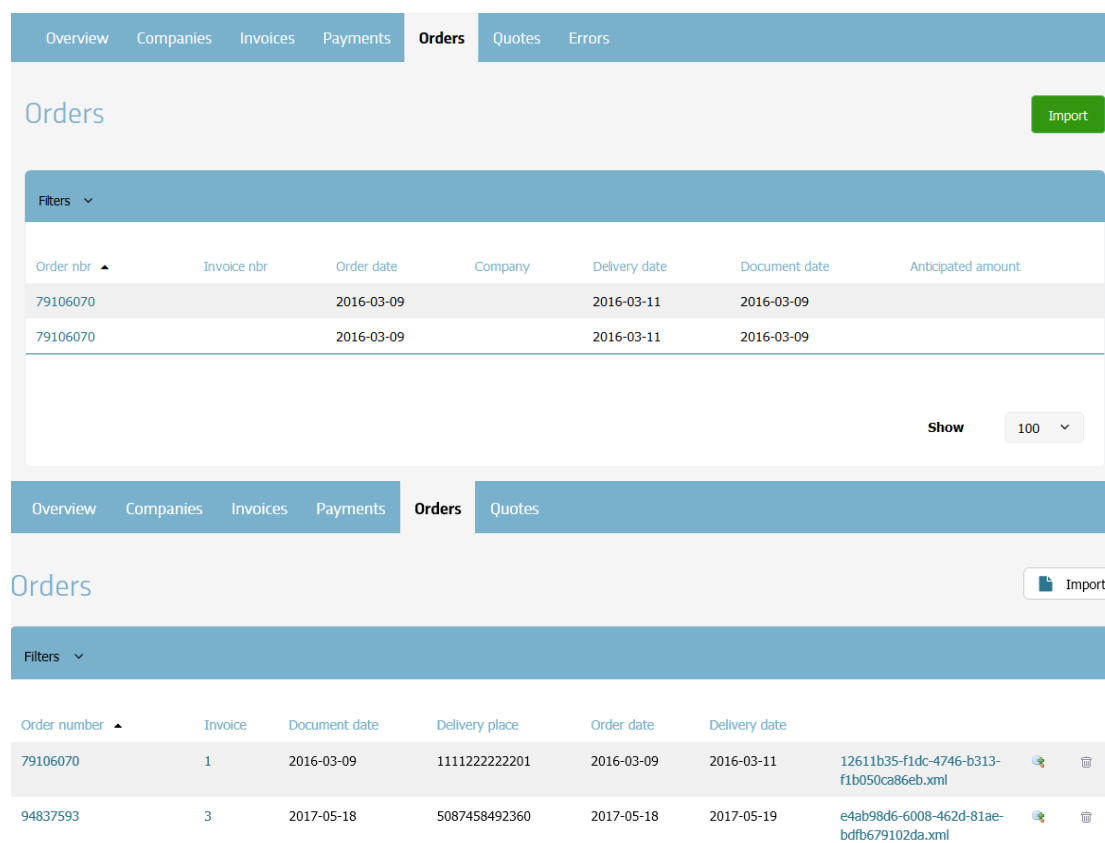
 UHT@gmail.com
 English

Section 6 – Receiving Orders and Converting an Order to an Invoice

Go To:

Main Menu: Orders

When an order is received from a customer, you will receive an automated email notification. However, at any time you can go to 'Orders' through the main menu and the following screen will appear.



The screenshot shows the 'Orders' screen in the B2B Router. The top navigation bar includes 'Overview', 'Companies', 'Invoices', 'Payments', 'Orders' (selected), 'Quotes', and 'Errors'. The main heading is 'Orders' with an 'Import' button. Below is a table with columns: Order nbr, Invoice nbr, Order date, Company, Delivery date, Document date, and Anticipated amount. The table contains two rows of data. At the bottom right, there is a 'Show' button and a dropdown menu set to '100'.

Order nbr	Invoice nbr	Order date	Company	Delivery date	Document date	Anticipated amount
79106070		2016-03-09		2016-03-11	2016-03-09	
79106070		2016-03-09		2016-03-11	2016-03-09	

Below the table, there is a 'Show' button and a dropdown menu set to '100'.

Click on the '**Order Number**' to view the details (example below) or download and save the order in a PDF format. You have the ability **to create an invoice from the order details** with the simple click of a button and to send it to your customer once the goods have been shipped (or services performed).

Please note: An order may or may not contain the necessary VAT information needed for the invoice, so it is important to check for VAT on the order, and to always review the converted invoice to ensure all of the details are included, and that the VAT value is correct for the new invoice, before saving and sending. In the example provided below, you will notice the order contains the total amounts with and without VAT.

Invoice
Download
Mark as
More

Accepted

DISTRIBUTION CENTRE

WEST
Street address: PARK ESTATE
DE55 4QJ London
DERBYSHIRE

ESQ7150008F (GLN, Endpoint ID)

Contact information
Mike
Tel. 0000 000000
info@b2brouter.net

Order ID:
21212121

Date: 2018-09-24
Validity period:

Contract: 00000001

Additional reference ▾

Seller party

MED UK
72
Street address: London
HD8 8LU London
Country: GB

Y3514797C (GB:VAT, Endpoint ID)
14967900 (ZZZ)

Delivery location

GAWBER ROAD
Street address: BARNSELY SOUTH YORKSHIRE
S75 2EP
Country: GB

Requested delivery period: 2018-09-26,

Line	Product	Description	Quantity	Price unit	Price
#1	FR855LAQ	SUTURES ABSORBABLE GLICOFIL LAC USP 1	3 BX	27.6700	83.0100 GBP
		<ul style="list-style-type: none"> Description: SUTURES ABSORBABLE GLICOFIL LAC USP 1 Additional item properties: BuyersItemIdentification: FKV912 Classified tax category: Tax category ID: 5 Tax scheme ID: VAT 			
#2	FU871LWAQ	SUTURES ABSORBABLE GLICOFIL LAC USP 2.0	1 BX	86.8100	86.8100 GBP
		<ul style="list-style-type: none"> Description: SUTURES ABSORBABLE GLICOFIL LAC USP 2.0 Additional item properties: BuyersItemIdentification: FKV11630 Classified tax category: 			

You can download a label of the order using the link 'More' and 'Order labels'.

Invoice
Download
Mark as
More

Accepted

DISTRIBUTION CENTRE

Import

Order labels

Download original

Delete

Order ID:
21212121

Date: 2018-09-24


The label will be downloaded in PDF format.

Next, click on 'Create Invoice' from the menu in the Order screen, and a new invoice will be created directly from the order, (see example below), which should be edited to adjust quantities or tax details according to what has actually been delivered. The PDF version of the invoice will also contain your company logo, if you uploaded it to the portal in your company set-up screen.
(Go to: Configure>Companies>Fiscal Data, to upload your logo).

← Invoice 8

Order Edit Mark as Download PDF copy Send More

New


b2brouter

B2B Router
Ribes 31
08192 Barcelona
VAT ID Number ESY3514797C
creditcontrol.healthcare@bunzl.co.uk

Invoice 8
Derby Teaching Hospitals NHS Foundation Trust
Uttoxeter Road
DE223NE Derby , Derbyshire
United Kingdom
VAT ID Number: GB654967976

Date **18/05/2018**
Purchase Order: 79106070

Delivery information:
Delivery date: 2016-03-11
GLN - 1111222222201
UTTOXETER ROAD
RECEIPT AND DISTRIBUTION
DE22 3NE
DERBY
GB

Description	Quantity	Amount	Total
W3550/4 Turbine for ML3500 MK8 Spirometer <small>· Seller product ID: W3550/4</small>	2	£64.20	£128.40
Subtotal			£128.40
Total amount			£128.40

Notes: W3550/4

← Invoice 3

Order

Edit

Delete

Mark as

Send

More options ...

< >

New

CE Supplies UK Limited

Any Street

SW13RB London

London

VAT ID Number GB987654321

www.cesupplies.co.uk

ce52@btinternet.com

Invoice 3

Tech Hospitals NHS Trust

Main Road

XX12 3AE LONDON , London

VAT ID Number: GB101203596

Delivery information:

GLN - 5087458492360

MAIN ROAD

XX12 3AE

LONDON

Date 22/06/2017

Purchase Order 94837593

Q	Code	Description	Amount	Total
1	908450385034	ACC MAN PP	£495.48	£495.48
		Notes: NOTE 1 094385035		
1	09234024032	GTHX SAO CC	£495.48	£495.48
		Notes: NOTE 2 30003402		
1	9340230239483	ID GREN DSK	£316.88	£316.88
		Notes: NOTE 3 023409203		
1	9934203943	DESC HS MM	£67.24	£67.24
		Notes: NOTE 4 39409423		
2	948549949	DKFSK ASDF	£67.24	£134.48
		Notes: NOTE 5 398443045		
1	98304024234	HUG SN	£180.97	£180.97
		Notes: NOTE 6 98493933		
Subtotal:				£1,690.53
Total				£1,690.53

Notes

NOTE

Organization ID/Company Registration Number: 7654321

Next, click on **'Edit'** in the invoice menu bar and you will be presented first with the 'header' level section of the invoice in the **'Invoice data'** sub-menu, (see the example below). Here you can enter any additional details that may not have been included in the order received from your customer, and save your changes to the invoice.

Page 20 of 39

1. General data Required data *

Client:
☒ New company

Method of delivery:

Your email:

Invoice:

Invoice number	Date	Series
<input type="text" value="8"/>	<input type="text" value="18/05/2018"/>	<input type="text"/>

Last used: 8

Tax Point Date:

Invoicing period:

Invoicing period start	Invoicing period end
<input type="text" value="dd/mm/yyyy"/>	<input type="text" value="dd/mm/yyyy"/>

Branch:

Buyer Reference:

Accounting cost:

Order:

Purchase Order	Order date	Sales order reference
<input type="text" value="79106070"/>	<input type="text" value="dd/mm/yyyy"/>	<input type="text"/>

Despatch advice nbr:

Contract number:

File number:

Tender or Lot number:

Receiving advice:

[Cancel](#) [Save](#) [Save and preview](#)

Next, click on **'Lines'** in the sub-menu of the invoice, and you will be presented with the line item detail that can be edited, if you wish to provide additional information. In this screen you also need **to choose the appropriate VAT percentage**, and whether you wish the VAT to be detailed at the item line or summary level of the invoice, before saving your changes. Please see the example below.

Invoice 8

1. General data

2. Lines

3. Payment method

4. Allowances and charges

5. Additional documents

6. Delivery

2. Lines Required data

Taxes

IRPF: Do not apply ☐ Apply by line

IVA: 21.0% ☐ Apply by line

VAT: 20.0% ☐ Apply by line

Lines

Line	Description	Quantity	Price
#1	W3550/4 Turbine for ML3500 MK8 Spirometer	2	Other 64.2

More options for this line: #1

New line

General note:

NOTE
Organization ID/Company Registration Number: 7654321

Cancel

Save

Save and preview

Invoice 3

1. Invoice data

2. Lines

3. Factoring assignment

4. Attached files

2. Lines

Taxes

VAT: 20.0% ☒ Line tax

Lines

Line	Description	Quantity	Price	Code	VAT
1	ACC MAN PP	1	Other 495.48	90845C	20.0%
More options for this line					
2	GTHX SAO CC	1	Other 495.48	09234C	20.0%
More options for this line					
3	ID GREN DSK	1	Other 316.88	93402C	20.0%
More options for this line					
4	DESC HS MM	1	Other 67.24	99342C	20.0%
More options for this line					
5	DKFSK ASDF	2	Other 67.24	94854C	20.0%
More options for this line					
6	HUG SN	1	Other 180.97	98304C	20.0%
More options for this line					
Add a new invoice line					

Cancel

Save

Save and send

Once you have saved your changes, you can see an on-line view of the invoice (see example below). You can also click on '**Download PDF copy**' to download a PDF of the invoice.



B2B Router
 Ribes 31
 08192 Barcelona
 VAT ID Number ESY3514797C
 creditcontrol.healthcare@bunzl.co.uk

Invoice 8

Derby Teaching Hospitals NHS Foundation Trust
 Uttoxeter Road
 DE223NE Derby, Derbyshire
 United Kingdom
 VAT ID Number: GB654967976

Date **18/05/2018**

Purchase Order: 79106070

Delivery information:

Delivery date: 2016-03-11
 GLN - 1111222222201
 UTTOXETER ROAD
 RECEIPT AND DISTRIBUTION
 DE22 3NE
 DERBY

Description	Quantity	Amount	Total
W3550/4 Turbine for ML3500 MK8 Spirometer · Seller product ID: W3550/4 Notes: W3550/4	2	£64.20	£128.40
Subtotal			£128.40
VAT 20,00%			£25.68
IVA 21,00%			£26.96
Total amount			£181.04

Notes

NOTE
 Organization ID/Company Registration Number: 7654321

CE Supplies UK Limited*Any Street**SW13RB London**London*

VAT ID Number GB987654321

www.cesupplies.co.uk

ce52@btinternet.com

Invoice 3**Tech Hospitals NHS Trust***Main Road**XX12 3AE LONDON, London*

VAT ID Number: GB101203596

Date **22/06/2017**

Purchase Order 94837593

Delivery information:*GLN - 5087458492360**MAIN ROAD**XX12 3AE**LONDON*

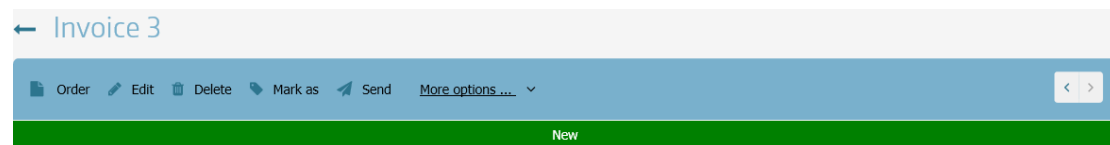
Q	Code	Description	Amount	Total
1	908450385034	ACC MAN PP	£495.48	£495.48
	Notes: NOTE 1 094385035			
1	09234024032	GTHX SAO CC	£495.48	£495.48
	Notes: NOTE 2 30003402			
1	9340230239483	ID GREN DSK	£316.88	£316.88
	Notes: NOTE 3 023409203			
1	9934203943	DESC HS MM	£67.24	£67.24
	Notes: NOTE 4 39409423			
2	948549949	DKFSK ASDF	£67.24	£134.48
	Notes: NOTE 5 398443045			
1	98304024234	HUG SN	£180.97	£180.97
	Notes: NOTE 6 98493933			
			Subtotal:	£1,690.53
			VAT 20,00%:	£338.11
			Total	£2,028.64

Notes

NOTE

Organization ID/Company Registration Number: 7654321

You can click on **'Send'** at the top of the screen (see below), if you are ready to send the invoice, or you can save it and send it at a later date.



The invoice will be saved in the **'Invoice'** section of the portal, where you can choose to send (or delete) it at any time.



Section 7 - Creating and Sending Invoices

Go To:

Main Menu: Invoices

Sub- Menu: Issued Invoices

You can also create invoices directly (without receiving and converting an Order) at any time.

Click on the '**New Invoice**' button and complete the invoice details (sample data used in the example below). **Please note:** Only those fields containing a * symbol are mandatory to complete.

The screenshot shows the '1. General data' tab of the invoice creation interface. On the left is a sidebar with tabs: 1. General data (selected), 2. Lines, 3. Payment method, 4. Allowances and charges, 5. Additional documents, and 6. Delivery. The main form area is titled '1. General data' and includes a 'Required data *' label. The form contains the following fields:

- Client:** A dropdown menu with 'Select company...' and a 'New company' link.
- Method of delivery:** A text field with the placeholder 'Depends on the client selected'.
- Invoice:** A section with three sub-fields: 'Invoice number' (containing '8'), 'Date' (containing '11/05/2018'), and 'Series' (empty). Below 'Invoice number' is a small text 'Last used: 7'.
- Tax Point Date:** A text field with the placeholder 'dd/mm/yyyy'.
- Invoicing period:** Two text fields: 'Invoicing period start' (placeholder 'dd/mm/yyyy') and 'Invoicing period end' (placeholder 'dd/mm/yyyy').
- Buyer Reference:** A text field.
- Accounting costs:** A text field.
- Order:** A section with three sub-fields: 'Purchase Order' (empty), 'Order date' (placeholder 'dd/mm/yyyy'), and 'Sales order reference' (empty).
- Despatch advice nbr:** A text field.
- Contract number:** A text field.
- File number:** A text field.
- Tender or Lot number:** A text field.
- Receiving advice:** A text field.

The screen print **above** shows the **top part** of the invoice screen.

When you select the Client from the dropdown list, the way the invoice will be submitted is displayed in the Method of Delivery. If you want to send via PEPPOL, the Method of Delivery will be PEPPOL.

For taxes (VAT), click on the 'Lines' tab, and you can see the standard VAT rate for the UK is displayed as the default, (you can change it to the lower rate or zero rate where required), and VAT will be at the invoice level, unless you tick the 'line tax' box, and then the system will calculate and display VAT on each invoice line.

For **Invoice Lines**, enter the quantity, the type of measurement (hours, units, etc.), the **product code** and the **unit cost**. The system will calculate the extended line item cost (number of units X unit cost) plus VAT when the line item VAT box is ticked, (as described above). You can also enter **discounts, charges, despatch advice and receiving advice information at the line item level**. See the sample input in the screen print above and the completed invoice in the screen print below.

If you need to **delete a line**, just click on the **waste basket symbol** beside the line item.

If you need to **add lines**, click on the **blue + 'Add a new invoice line'**

The line item # (available under each line item) is an option if you need to identify which line number of the original order that this invoice line belongs to (particularly if some parts of the original order will be shipped and invoiced at a later date).

If you need to **attach a document** which backs up the invoice, advance to '5. Additional documents' and click on the '**Upload File**' button and upload the attachment.

The screenshot shows the 'Invoice 7' interface. At the top, there is a navigation bar with tabs: Overview, Companies, Invoices (selected), Payments, Orders, Quotes, and Errors. Below this, the main content area is titled 'Invoice 7'. On the left, there is a sidebar with a list of steps: 1. General data, 2. Lines, 3. Payment method, 4. Allowances and charges, 5. Additional documents (highlighted), and 6. Delivery. The main content area displays the '5. Additional documents' section. It includes a 'Required data' label with a red asterisk. Below this, there is a text box stating: 'You can add attachments to the invoice (max 50MB). These documents will be sent along with the invoice.' Underneath the text box, there are two buttons: 'Upload file' (with a file icon) and 'Add link to the file' (with a link icon). At the bottom right of the section, there are three buttons: 'Cancel', 'Save', and 'Save and preview'.

There is a section for **Factoring Assignment (3rd party invoice financing)**. Click on the '3. Payment method' and use the link '**Factoring Assignment**' tab (See the sample input in the screen print below), and enter details, (if applicable).

The screenshot shows the 'Factoring assignment' form in the B2B Router. On the left is a sidebar with navigation links: '3. Payment method' (highlighted), '4. Allowances and charges', '5. Additional documents', and '6. Delivery'. The main form area has a top bar with three dropdown menus: 'Select', 'EUR - Euro', and 'Select'. Below this is a section titled 'References, prepayments, withholdings' with a dropdown arrow. The 'Factoring assignment' section is a light blue box with a 'Close' button and an upward arrow. It contains the following fields: 'Name:', 'VAT ID number:', 'Address:', 'Postcode:', 'City:', 'Province/County:', 'Country:' (with 'Spain' selected), 'Information:', 'Payment:' (with sub-fields for 'Amount' showing '0.0', 'Payment method' showing 'In cash', and 'Due date' showing 'dd/mm/'), 'Bank info:' (with sub-fields for 'IBAN' and 'Bank code'), and 'Assignment clause:'. At the bottom right of the form are three buttons: 'Cancel', 'Save', and 'Save and preview'.

To **complete the invoice and view it** (or delete it) before sending, click on '**Save and preview**' at the bottom of your screen.


Or you can also save the changes and continue to edit the invoice. To do this use the '**Save**' option.

When you click on the '**Save and preview**' button, the invoice details are displayed as below, (your logo will appear in the top left-hand corner if uploaded in your company set-up process).

← Invoice 7

Edit Mark as Download PDF copy Send More

New



B2B Router
Ribes 31
08192 Barcelona
VAT ID Number ESY3514797C
agasset@b2brouter.net

Invoice 7
[UK Hospital Trust Company](#)
Any Avenue
NW14T4S London
United Kingdom
VAT ID Number: GB238769991

Date 10/05/2018

Description	Quantity	Amount	Total
ACC MAN PP	23 units	€13	€299.00
		Subtotal	€299.00
		IVA Exempt	€0.00
		Total amount	€299.00

Notes
IVA Exempt: Art 20.3

← Issued invoice N16-3866

Edit Delete Mark as Send More options ...

Registered

Business Test
Test
20029 Tarragona
Tarragona
VAT ID Number ESR8898083D
businesstest@invinet.org

Invoice N16-3866
[Ayuntamiento de Madrid](#)
CALLE MONTALBAN, 1
28014 Madrid , Madrid
VAT ID Number: ESP2807900B
Accounting unit: E00117701
Managing unit: E04888701
Processing unit: E04888701

Date 27/10/2016

Q	Code	Description	Amount	Total
230	2323	Bicicletas eléctricas	€78.60	€18,078.00
20	2221	Cargador eléctrico	€145.30	€2,906.00
		Subtotal:		€20,984.00
		IVA 21,00%:		€4,406.64
		Total		€25,390.64

* FACTURAE32 Since this electronic invoice has been imported and it has not been updated, the original imported invoice will be sent.

History Comments

From the invoice view (shown above), you can edit the invoice, delete it, send it, download PDF copy and /or look at more options (download it in its XML format, Duplicate, etc.).

Clicking on the 'Send' option will submit the PEPPOL BIS invoice through the PEPPOL network.

The PDF version of the invoice will also display your company logo (if you uploaded it in your company set-up process).

If you click on '**Reports**', you can see the invoice you created, (and any others created previously).

The screenshot displays the B2B Router interface. At the top, there is a navigation bar with tabs: Overview, Companies, Invoices, Payments, Orders, and Quotes. The 'Invoices' tab is active, and within it, the 'Reports' sub-tab is selected. Below the navigation bar, there are three sub-tabs: Issued invoices, Recurring, and Received invoices. The 'Reports' sub-tab is active. The main content area is titled 'Invoices report'. It features two date range selectors. The first selector has a 'Date' field with the value '2017-01-01' and a 'To' field with the value '2017-06-23'. Both fields have calendar icons. To the right of these fields is an 'Apply' button. Below this, there is a section titled 'Invoices by Channel and State' with a button labeled 'Invoices by Channel and State'. At the bottom, there is a section titled 'Received invoices' with another identical date range selector and 'Apply' button.

If you click on '**Issued Invoices**', you can see the invoice listed (below), and you can click on the invoice number to view the details.

[Issued invoices](#)
[Recurring](#)
[Received invoices \(12\)](#)
[Reports](#)

Issued invoices

Export

Send invoices (3)

New

Filters

Find

	Number	Date	Term	Company	Taxable base	Total	Status
	7	10/05/2018		UK Hospital Trust Company	€299.00	€299.00	New
	6	26/04/2018		Generalitat de Catalunya	€1,230.00	€1,482.00	New
	5	08/03/2018		Servei Català de la Salut	€15.07	€15.07	Registered
	4	11/02/2018	11/01/2018	Ayuntamiento de Madrid	€523.83	€544.78	New
	3	23/01/2018		Junta de Andalucía	€36.00	€43.56	Refused
	2	22/01/2018	15/02/2018	Ayuntamiento de A Coruña	€1.00	€1.21	Sent
	1	07/01/2018		SERVICIO DE SALUD DE CASTILLA-LA MANCHA	€1.00	€1.21	Read

Show

25

[Issued invoices](#)
[Recurring](#)
[Received invoices](#)
[Reports](#)
[Import errors](#)

Issued invoices

Export

Send invoices (3)

New

Filters

Number, Notes, Descrip

	Number	Date	Term	Company	Taxable base	Total	Status
	704101517	15/02/2017	15/03/2017	HOSPITAL GENERAL DE TOMELLOSO	€747.34	€904.28	New
	N16-3867	22/11/2016		Contoso	€2,649.60	€3,206.02	New
	N16-3864	27/10/2016		Ayuntamiento de Madrid	€26,044.00	€31,513.24	Error
	N16-3866	27/10/2016		Ayuntamiento de Madrid	€20,984.00	€25,390.64	Registered
	N16-3863	01/06/2016		Ministerio De Agricultura, Alimentacion Y Medio Ambiente	€3,635.00	€4,398.35	New

Show

25

Please Note: If you send recurring invoices to the same customer for the same amount (monthly or any other period), you can click on the **'Recurring'** function and set them up there.

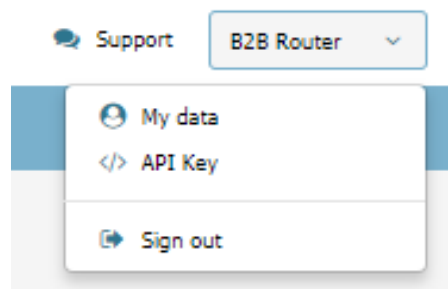
Section 8 – Preferences, Account Details and Adding Additional Users

To set your user preferences:

Go To: From any screen

Click on the drop-down arrow beside your user name (top right-hand corner of your screen)

Choose: 'My Data'



In this section you can set your User preferences and change any data (Name, surname, email or password).

A screenshot of the 'My account' page. The page has a header with 'My account' and a 'Delete my account' link. On the left, there is a sidebar menu with 'My data', 'Preferences', and 'API access key'. The main content area is titled 'My data' and contains form fields for 'Name' (B2B), 'Surname' (Router), 'Email' (aleix303@gmail.com), 'Password' (with a 'Change password' link), and 'Language' (English). A 'Save' button is at the bottom right.

Choose '**Preferences**' (see left menu) to edit the notifications you wish to receive from B2B Router (for incoming orders or invoices).

For Email notifications, choose: '**For any event on all my projects**' from the dropdown list.

You can also choose your time zone and other preferences (Please see the example below).

The image displays two screenshots of the 'My account' preferences page. Both screenshots show a sidebar with 'My data', 'API access key', and 'Preferences' (selected). The main content area is titled 'Preferences' and contains several settings:

- Email notifications:** A dropdown menu. In the top screenshot, it is set to 'For any event on all my projects'. In the bottom screenshot, it is set to 'Only for things I watch or I'm involved in'.
- I don't want to be notified of changes that I make myself:** A toggle switch. In the top screenshot, it is turned on (green). In the bottom screenshot, it is turned off (grey).
- Time zone:** A dropdown menu, currently showing an empty selection.
- Display comments:** A dropdown menu, currently set to 'In chronological order'.
- Hide my email address:** A toggle switch. In the top screenshot, it is turned on (green). In the bottom screenshot, it is turned off (grey).
- Warn me when leaving a page with unsaved text:** A toggle switch, which is turned on (green) in both screenshots.

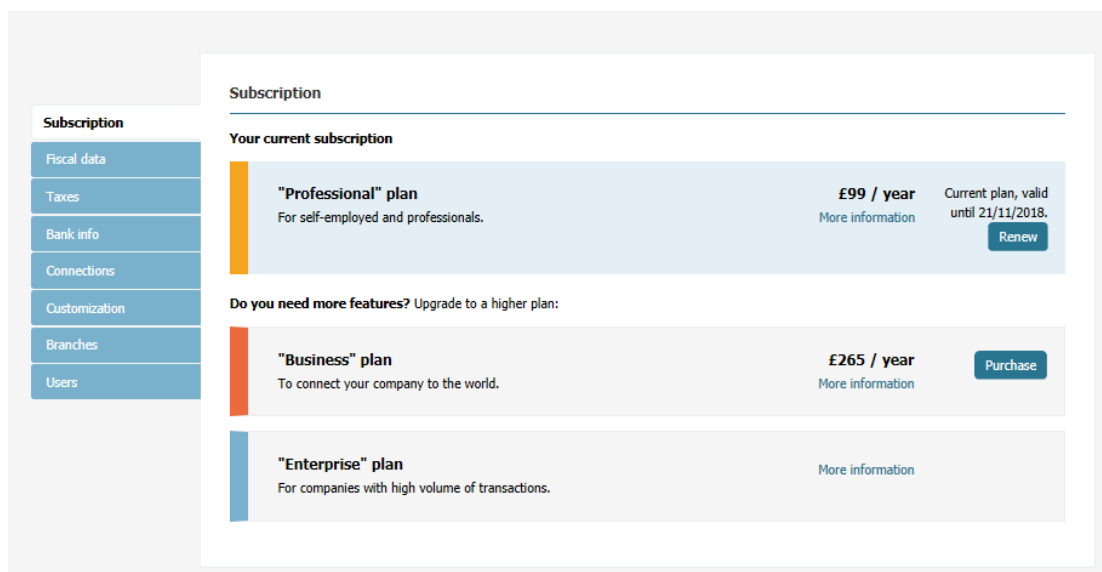
A 'Save' button is located at the bottom right of the preferences section in both screenshots.

To set your company preferences:

Go To: From any screen

Click on the Configure option in the top right of the screen

Choose: 'Adjustments'



You can also choose:

‘Subscription’ to view your current ‘Plan’ and the date upon which it expires.

‘Fiscal Data’ to manage your company fiscal information.

‘Taxes’ to select the tax information for your invoices.

‘Bank info’ to manage bank accounts you want to receive payments in.

‘Connections’ to customise different connection channels such as PEPPOL.

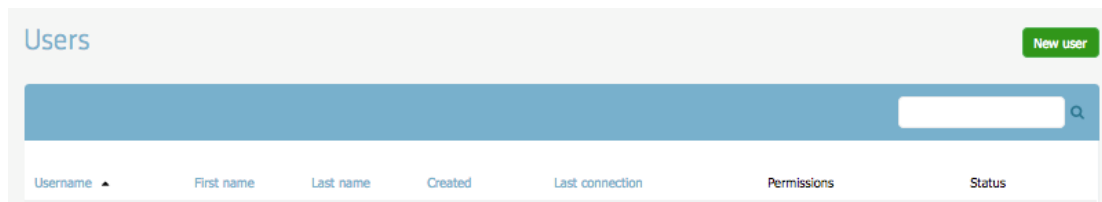
‘Customisation’ to set up specific parameters in the application.

‘Branches’ to define the branches of your business.

‘Users’ to set up users for the application.

To set up additional Users:

Go To: Select Users



Click on the Green **‘New User’** Button and you will be presented with the following screen (see example below), where you can add a new user to have access to the portal.

The image displays two screenshots of the 'Invite user' form in the B2B Router. Both screenshots show the 'User data' section with the following fields:

- User:** A dropdown menu with a 'New user' link below it.
- Permissions:** A dropdown menu.
- Access to:** A list of checkboxes for 'All sections', 'Invoices', 'Orders', 'Payments', 'Quotes', and 'SII'.
- Language:** A dropdown menu.

In the top screenshot, the 'Permissions' dropdown is set to 'View only' and 'All sections' is checked under 'Access to'. In the bottom screenshot, the 'Permissions' dropdown is set to 'Visualizar' and 'All sections' is also checked under 'Access to'. Both screenshots have 'Cancel' and 'Save' buttons at the bottom right.

Select the user from the drop-down list if they are already listed, or click on 'New user' to invite a new user to the portal. You need to use their email address. Select the permissions to be granted, and the modules the user will have access to, and the language they will use.

The user will receive an invitation email and will need to accept the invitation, by responding to the validation email, to then be activated as a new user for the company with the selected permissions.

To Suspend or Delete a User:

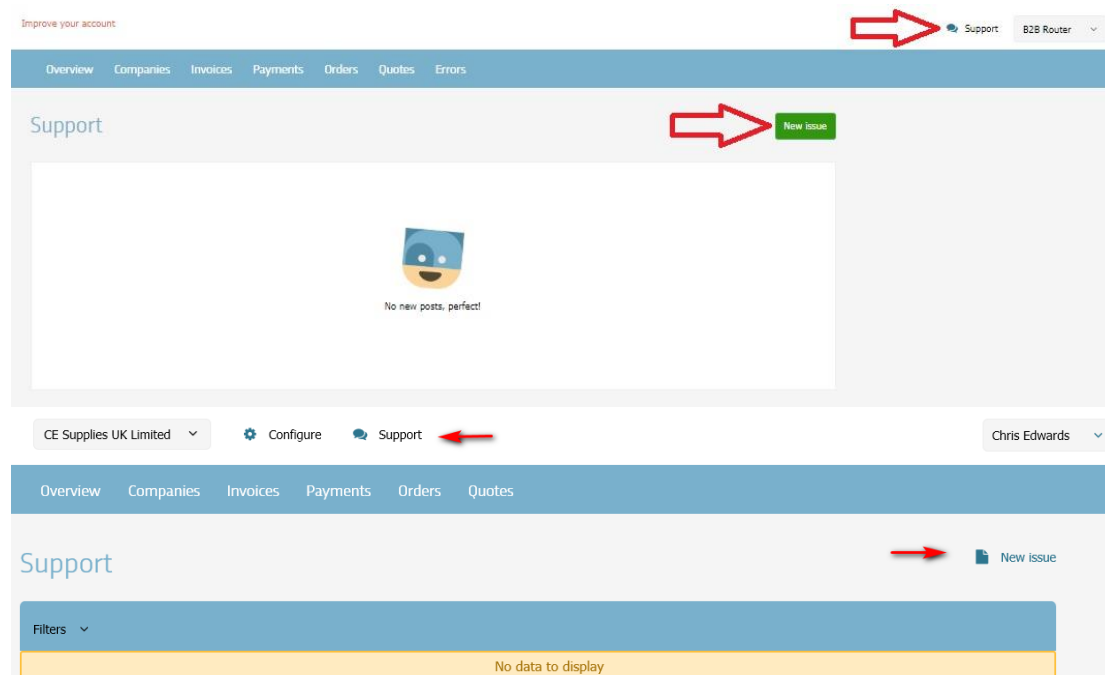
As a company owner, from any of the user screens, you can suspend a user by clicking on 'Delete' in the top right-hand corner of your screen using the waste basket icon (see below).



Section 9 – System Support

You can report any technical issues easily:

Click on 'Support' at the right top of your screen. If you have any open support issues pending, you will see them in the summary screen as below.



Click on 'New Issue', and the following screen will appear where you can describe your problem and attach any supporting documents or screen prints captured while experiencing difficulty.

←

New issue

Subject *

|

Write comment

Attach files

Select File

Cancel







Submit

New issue

Subject *

|

Description

B I U S C H1 H2 H3    pre <>   

Files

File

(Maximum size: 50 MB)

Create

Create and continue

Preview

You will receive a response by email and you will also be able to track the progress of your issue in the summary screen copied above.