OpusCapita

USER GUIDE FOR SUPPLIERS

OpusCapita Business Network

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Contents

1. Introduction

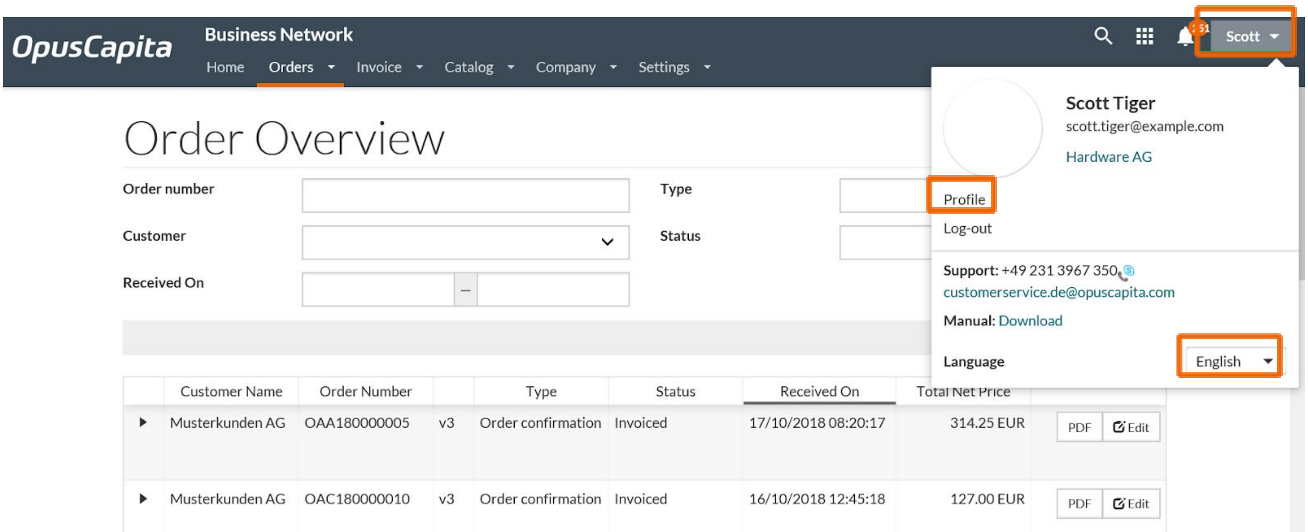
With OpusCapita Business Network, you can

- View and confirm your purchase orders, send order confirmations and turn the orders into invoices i.e. flip them
- Manually add invoices that are not based on purchase orders
- Select the invoice sending method from those the customer is requesting and then send the invoices to them as e-invoices
- View service orders and report your efforts related to them
- View archived invoices

The statuses of all the orders and invoices are updated constantly, offering you a real-time view to your transactions. You are notified of new documents or actions needed from you by email. The notification email includes a link directing you to the specific item.

When you log in, you land on the ***Home*** page, where you see the strength of your company, the existing connections as well as notifications of new items. The strength of the company can be enhanced by completing the company profile (see 3.1 Profile).

The application is available in English, German, Swedish and Finnish. You can change the language and update your user data in your profile settings, which you can access by clicking your username in the upper right corner.



2. Finalizing registration and changing your password

When your data has been added into the system, you need to finalize the registration (see 2.1 Finalize your registration).

If you have forgotten your password, you can change it. The administrator can also reset your password whenever necessary (see 3.2.3 Reset passwords), in which case you will receive a temporary password in your email.

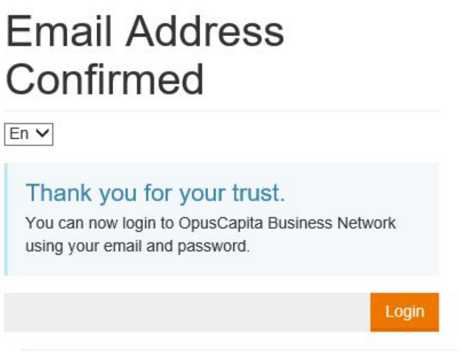
2.1 Finalize your registration

After the administrator has added your information into the system, you will receive an email with instructions for finalizing your registration. Note that the temporary password included in the email is valid for two days.

Finalize your registration as follows:

1. In the email you received, click the ***Confirmation*** link.

The ***Email Address Confirmed*** page opens.



2. Click ***Login***. The ***Login page*** opens. Your email address is shown in the ***Email*** field.
3. In the ***Password*** field, enter the password from the email.
4. Click ***Sign-in***. The ***Change your password*** page opens.
5. In the ***New password*** field, enter your desired new password. The password must meet the following requirements:
    - At least 8 characters
    - At least one special character
    - At least one lowercase and one capital letter
    - At least one number
6. In the ***Retype Password*** field, enter the same password again.
7. Click ***Submit***. Your password has now been changed, and you can use it for logging in.

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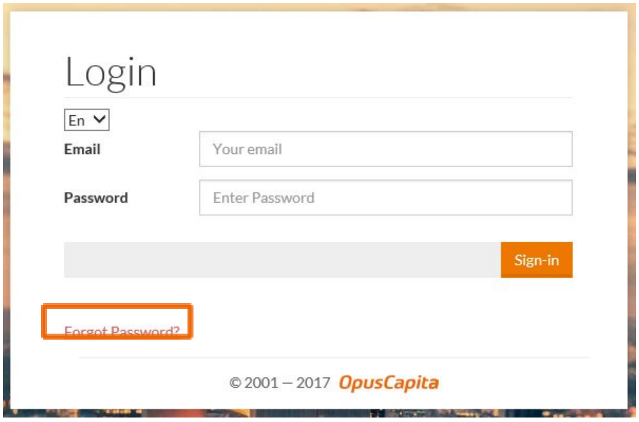
2.2 Change your forgotten password

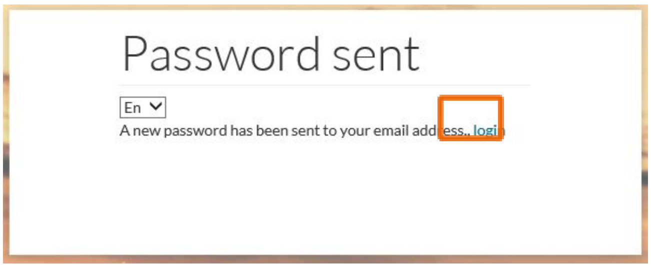
Change your forgotten password as follows:

1. On the ***Login*** page, click ***Forgot Password***.



   The ***Request Password*** page opens.

2. In the ***Email*** field, enter your email address.
3. Click ***Submit***. The ***Password sent*** page opens, informing you that a temporary password has been sent to your email. Note that the password is valid for 30 minutes.
4. Click the ***login*** link.



   The ***Login*** page opens.

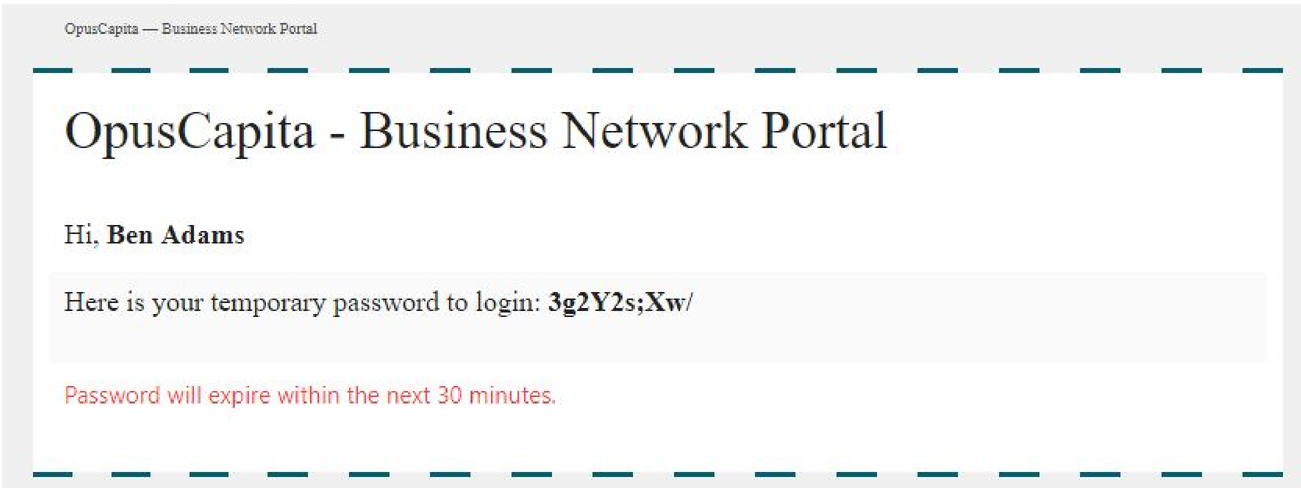
5. In the ***Password*** field, enter the temporary password.
6. Click ***Sign-in***. The ***Change your password*** page opens.
7. In the ***New password*** field, enter your desired new password. The password must meet the following requirements:
   - At least 8 characters
   - At least one special character

- At least one lowercase and one capital letter
- At least one number

8. In the ***Retype Password*** field, enter the same password again.
9. Click ***Submit***. Your password has now been changed, and you can use it for logging in.

2.3 Reset your password

If the administrator has reset your password, you receive a temporary password (valid for 30 minutes) in your email:



Reset your password as follows:

1. Go to the login page.
2. In the ***Email*** field, enter your email address.
3. In the ***Password*** field, enter the temporary password from your email.
4. Click ***Sign-in***. The ***Change your password*** page opens.
5. In the ***New password*** field, enter your desired new password. The password must meet the following requirements:
    - At least 8 characters
    - At least one special character
    - At least one lowercase and one capital letter
    - At least one number
6. In the ***Retype Password*** field, enter the same password again.
7. Click ***Submit***. Your password has now been changed.

3. Company information

You can edit the basic information of your company in the application. However, if you are not an administrator, you can only manage addresses and contact persons. As an administrator, you can also manage users.

3.1 Profile

On the ***Company*** / ***Profile*** page, you can add company details, turn contact persons into users and approve or reject access requests.

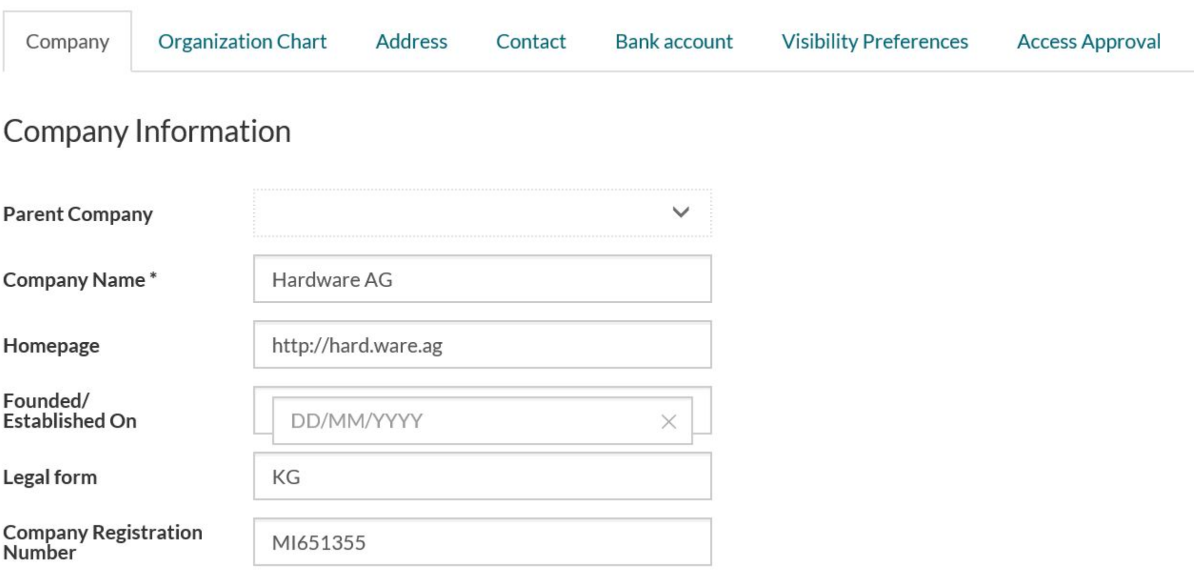
3.1.1 Add and edit company details

The organization chart of the implemented group structure is shown on the ***Organization Chart*** tab. It cannot be modified.

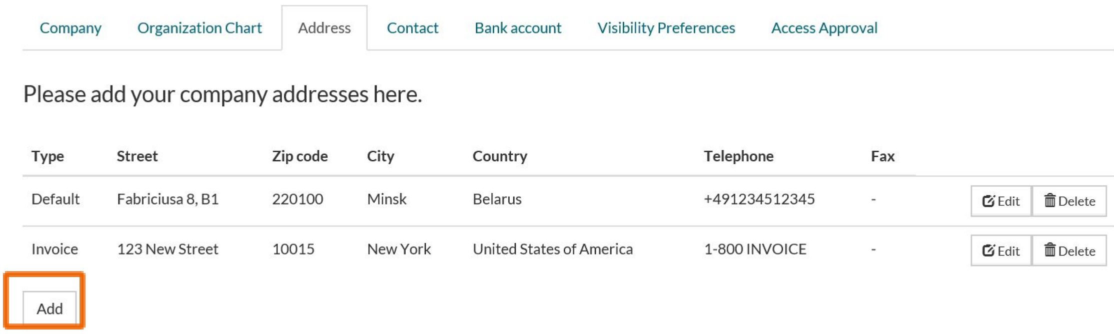
If you need to change the VAT Identification Number, contact OpusCapita's customer support.

Add company information as follows:

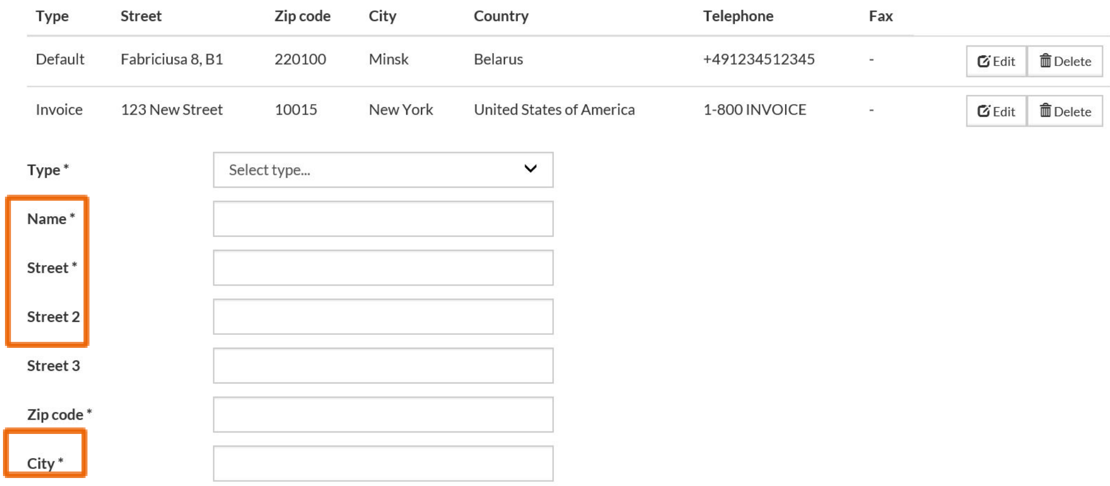
1. Click ***Company***, and select ***Profile***. The ***Company Information*** page opens.
2. On the ***Company*** tab, edit the basic data as necessary.



3. Add a company address as follows:
    a. Select the ***Address*** tab.
    b. Click ***Add***.



    Fields are opened for editing below the existing addresses.
    c. In the fields marked with an asterisk (*), select or enter the information.



    d. Enter other necessary data.
    e. Save the changes by clicking ***save***.
4. Add a contact person as follows:
    a. Select the ***Contact*** tab.
    b. Click ***Add***. Fields are opened for editing below the existing contact persons.

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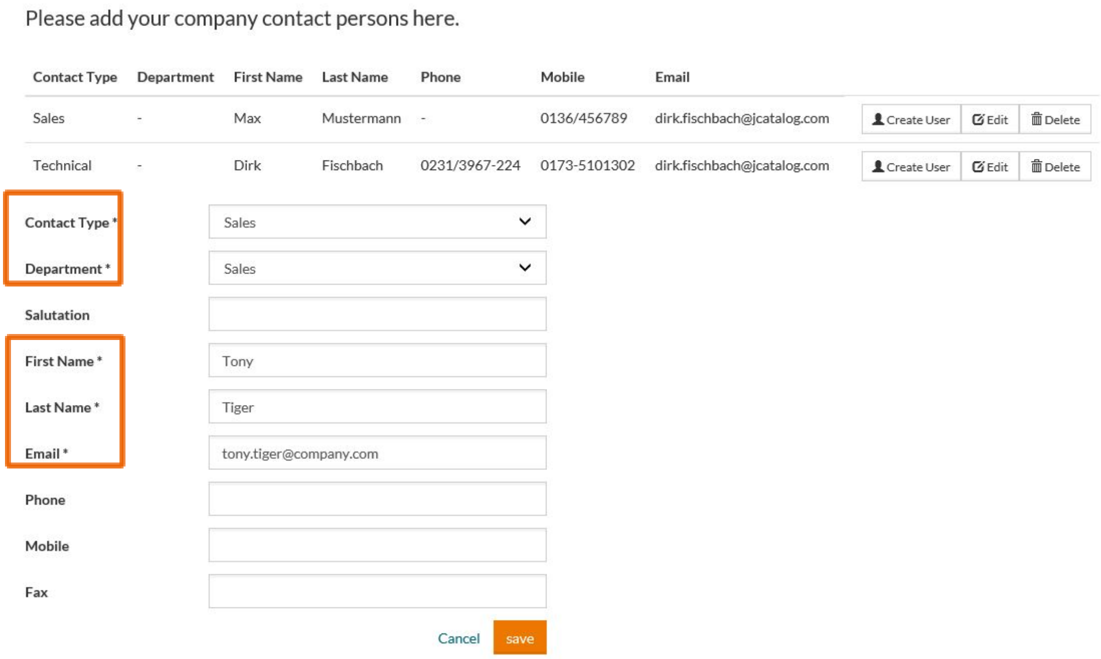
c. In the fields marked with an asterisk (*), select or enter the information.



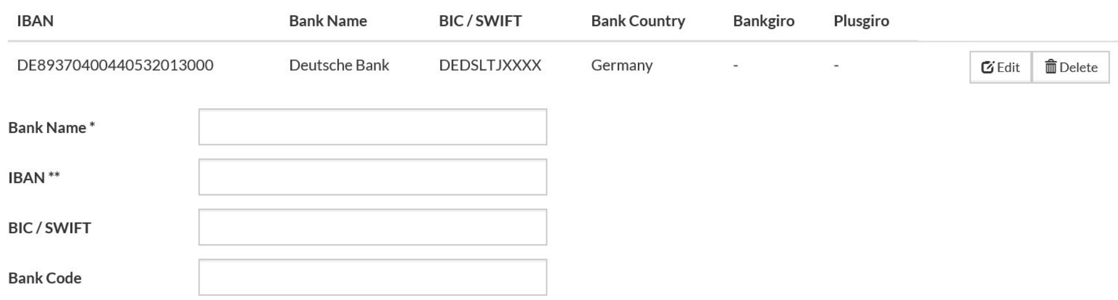
d. Enter other necessary data.

e. Save the changes by clicking ***save***.

5. Add a bank account as follows:

   a. Select the ***Bank account*** tab.

   b. Click ***Add***. Fields are opened for editing below the existing bank accounts.

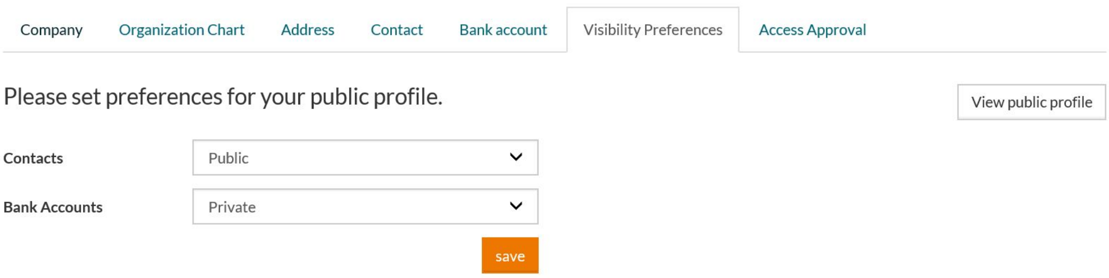


   c. In the fields marked with asterisks (* or **), select or enter the information.

      - If your company is in Sweden, you can use the ***Bankgiro*** or ***Plusgiro*** field instead of the IBAN.
      - If your company is in Switzerland, you can use the ***ISR number*** field with the IBAN. The ISR is shown on the invoice after the bank account number.

   d. Save the changes by clicking ***save***.

6. Define privacy settings as follows:
    a. Select the ***Visibility Preference*** tab.
    b. From the ***Contacts*** drop-down menu, select who will see the contact details:
        - If you want all companies to see the contact details, select ***Public***.
        - If you do not want any company to see the contact details, select ***Private***.
        - If you want your customers to see the contact details, select ***Business partner***.
    c. From the ***Bank Accounts*** drop-down menu, select who will see the bank accounts:
        - If you want all users to see the bank accounts, select ***Public***.
        - If you do not want anyone to see the bank accounts, select ***Private***.
        - If you want your customers to see the bank accounts, select ***Business partner***.



You can check what information is publicly available by clicking ***View public profile***.

7. Click ***save***.

If necessary, you can edit and delete addresses, contact persons and bank accounts:

- ***Edit***: Click ***Edit*** on the desired row. The fields open for editing. Make changes as necessary, and click ***save***.
- ***Delete***: Click ***Delete*** on the desired row. The application asks if you want to delete the address. Click ***OK***.

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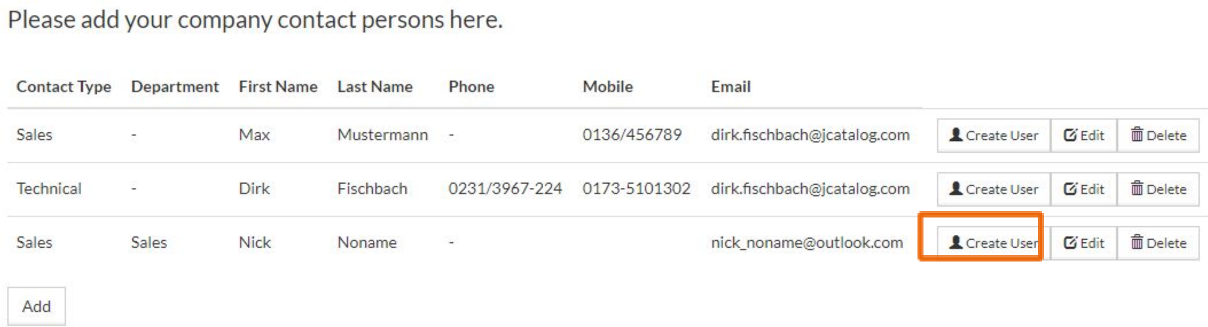
3.1.2 Turn contact persons into users

If necessary, you can turn a contact person into a user. The contact can then no longer be edited in company's contact details. You can delete the contact person from the contact person list – deleting the contact person in company details will not delete the user from the user list.

Turn a contact person into a user as follows:

1. Click ***Company***, and select ***Profile***. The ***Company Information*** page opens.
2. Select the ***Contact*** tab.
3. For the desired user, click ***Create User***.



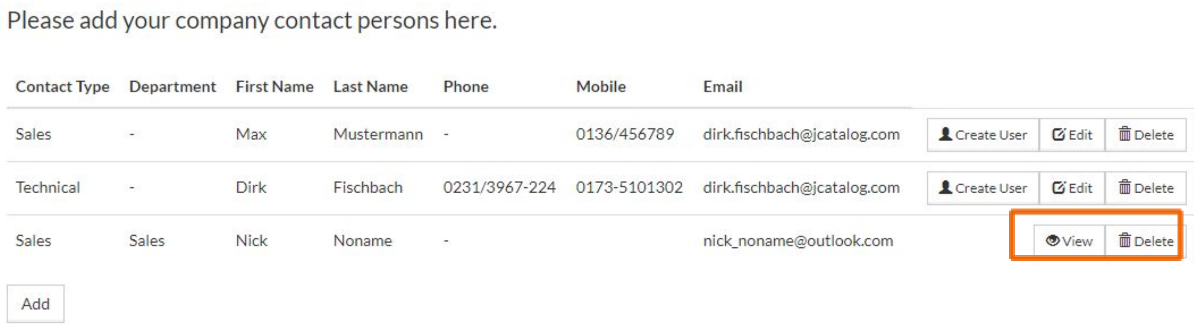
Please add your company contact persons here.

Contact Type	Department	First Name	Last Name	Phone	Mobile	Email	
Sales	-	Max	Mustermann	-	0136/456789	dirk.fischbach@jcatalog.com	Create User Edit Delete
Technical	-	Dirk	Fischbach	0231/3967-224	0173-5101302	dirk.fischbach@jcatalog.com	Create User Edit Delete
Sales	Sales	Nick	Noname	-		nick_noname@outlook.com	Create User Edit Delete

Add

The application asks if you want to create the user.

4. Click ***OK***. The contact person is then added to the user list (see 3.2 Users). In contacts, you can still view the details or delete the user from contact persons.



Please add your company contact persons here.

Contact Type	Department	First Name	Last Name	Phone	Mobile	Email	
Sales	-	Max	Mustermann	-	0136/456789	dirk.fischbach@jcatalog.com	Create User Edit Delete
Technical	-	Dirk	Fischbach	0231/3967-224	0173-5101302	dirk.fischbach@jcatalog.com	Create User Edit Delete
Sales	Sales	Nick	Noname	-		nick_noname@outlook.com	View Delete

Add

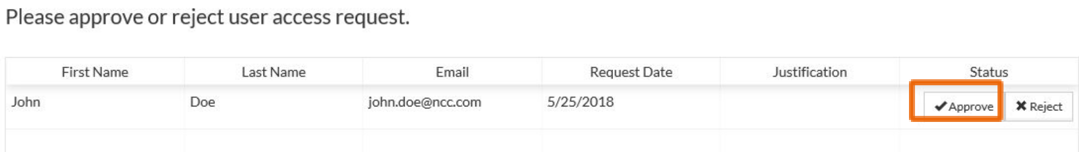
The contact person turned into a user needs to finalize their registration (see 2.1 Finalize your registration).

3.1.3 Approve or reject access requests

The first user registering into the application becomes the administrator. All the other registrations must be approved by the administrator, unless added by the administrator – the administrator receives an email whenever there are new requests.

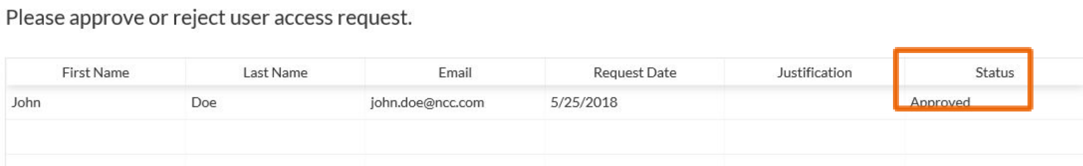
Approve or reject an access request as follows:

1. Click ***Company***, and select ***Profile***. The ***Company Information*** page opens.
2. Select the ***Access Approval*** tab.
3. Approve requests as follows:
    a. In the ***Status*** column, click ***Approve*** on the respective row.



    The application asks if you want to approve the request.

    b. Click ***OK***. The status of the request is now ***Approved***.

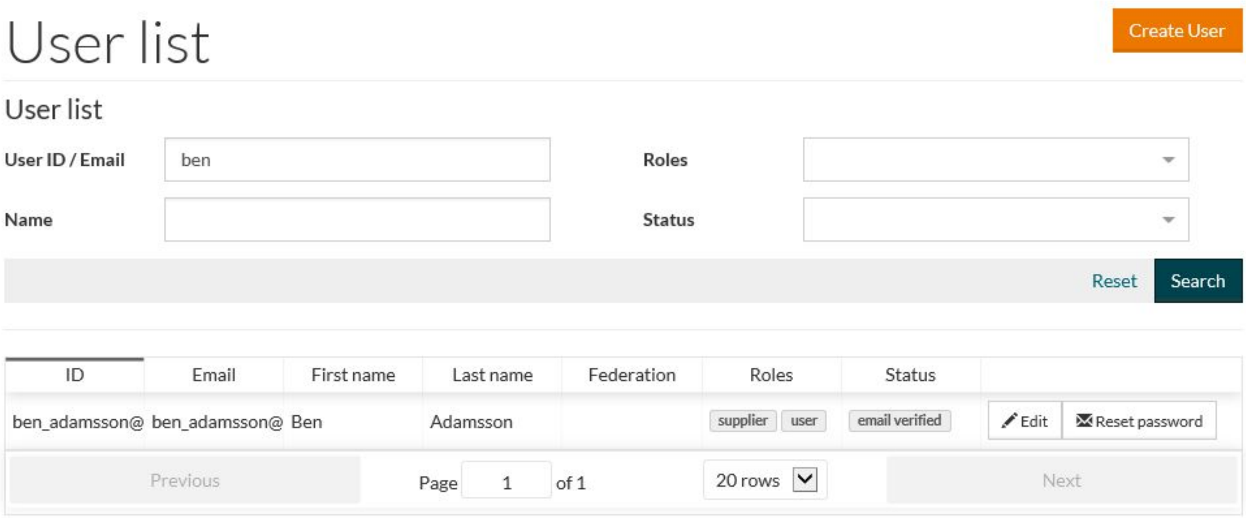


4. Reject requests as follows:
    a. In the ***Status*** column, click ***Reject*** on the respective row. The application asks if you want to reject the request.
    b. Click ***OK***. The status of the request is now ***Rejected***.

3.2 Users

On the ***Users*** page, you can add users and edit user data. Furthermore, as an administrator you can reset passwords for other users.

You can use one or more search criteria to easily find the desired user. After you have defined the criteria, click ***Search***. Only the users matching your search criteria are shown until you click ***Reset***.

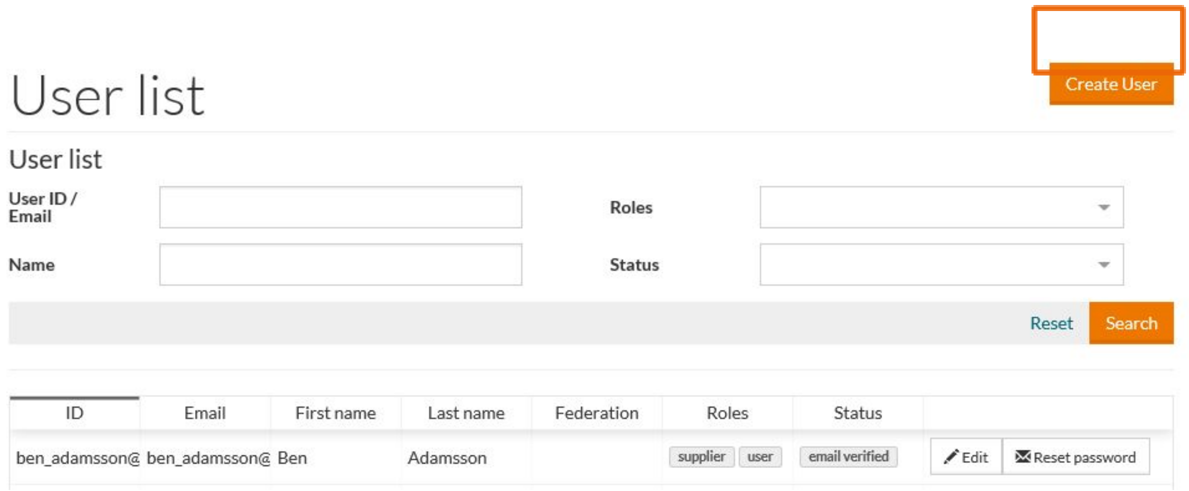


If you need to delete a user from the system, contact OpusCapita's customer support.

3.2.1 Add users

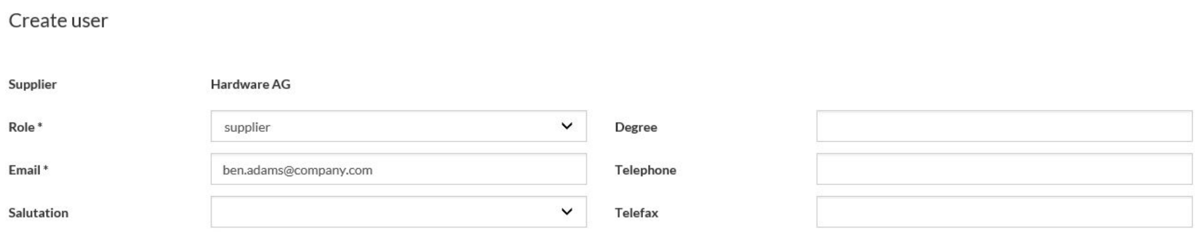
Add a user as follows:

1. Click ***Company***, and select ***Users***. The ***User list*** page opens.
2. Click ***Create User***.



The ***Create user*** page opens. The fields marked with an asterisk are required information.

3. From the ***Role*** drop-down menu, select the desired role. The role defines actions allowed for the user.
4. In the ***Email*** field, enter user's email address.



5. In the ***First name*** field, enter user's first name.
6. In the ***Last name*** field, enter user's last name.
7. From the ***Language*** drop-down menu, select the desired language. You can filter the options by starting to type the name of the language in the field.

   Note that the application is only available in English, German, Swedish and Finnish.
8. Enter other necessary data.
9. Click ***Create***. The user has now been added into the system. If you want, you can add more roles for the user.
10. If you want to add more roles for the user, do as follows:
    a. Select ***Roles***.
    b. From the ***Select role*** drop-down menu, select the role you want to add.

c. Click ***Add***. The role has now been added for the user.

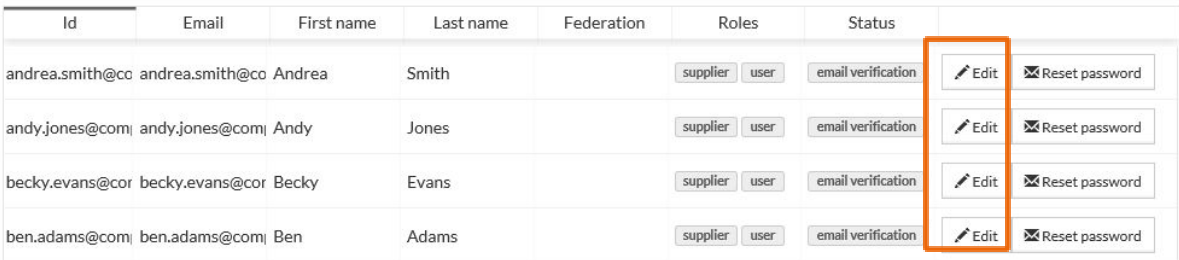
After adding the user into the system, the user receives an email with instructions for finalizing the registration (see 2.1 Finalize your registration).

You can also turn your contact persons into users, see 3.1.2 Turn contact persons into users.

3.2.2 Edit user data

Edit user data for a user as follows:

1. Click ***Company***, and select ***Users***. The ***User list*** page opens.
2. For the desired user, click ***Edit***.



   The ***Edit profile*** page opens.

3. Edit the data as necessary.
4. Click ***Save***.

If you need to delete a user from the system, contact OpusCapita's customer support.

3.2.3 Reset passwords

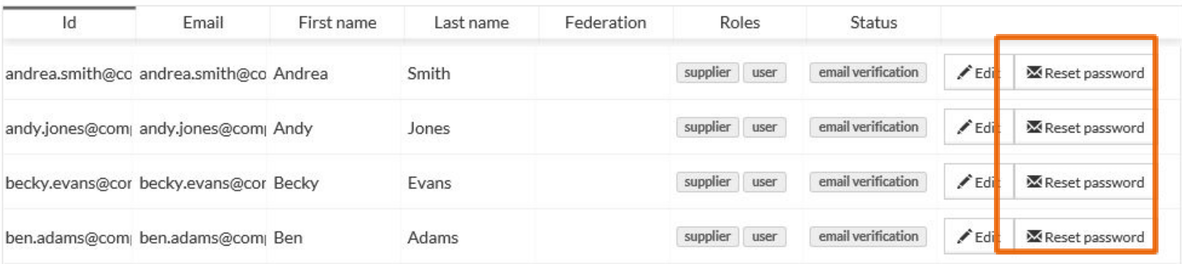
As an administrator, you can reset passwords for users whenever necessary. After you select to reset a password, the user will receive a temporary password which is valid for 30 minutes.

Reset a password as follows:

1. Click ***Company***, and select ***Users***. The ***User list*** page opens.

   By default, users are sorted by the user ID. By clicking the desired column header, you can sort by that column.

2. For the desired user, click ***Reset password***.



The instructions for setting a new password are sent to the user – the user needs to reset their password during the next 30 minutes (see 2. Finalize registration and change your password).

4. Orders

On the ***Orders*** / ***Overview*** page, you can view all the orders you have received. You can also confirm or reject purchase orders, report your efforts on service orders and flip orders into invoices.

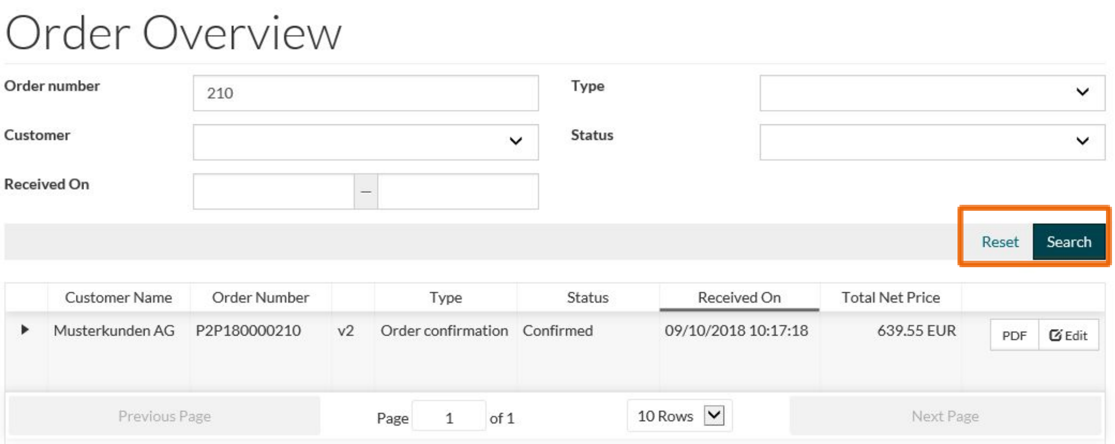
The status of a received messages is one of the following:

- ***Ordered***: The order has just arrived, and it has not been handled yet.
- ***Changed***: The buyer has changed the purchase order.
- ***Change requested***: You have proposed changes.
- ***Confirmed***: You have confirmed the purchase order.
- ***Partly confirmed***: You have partially confirmed the purchase order.
- ***Rejected***: You have rejected the purchase order.
- ***Partly rejected***: You have partially rejected the purchase order.
- ***Cancelled***: The customer has cancelled the order.

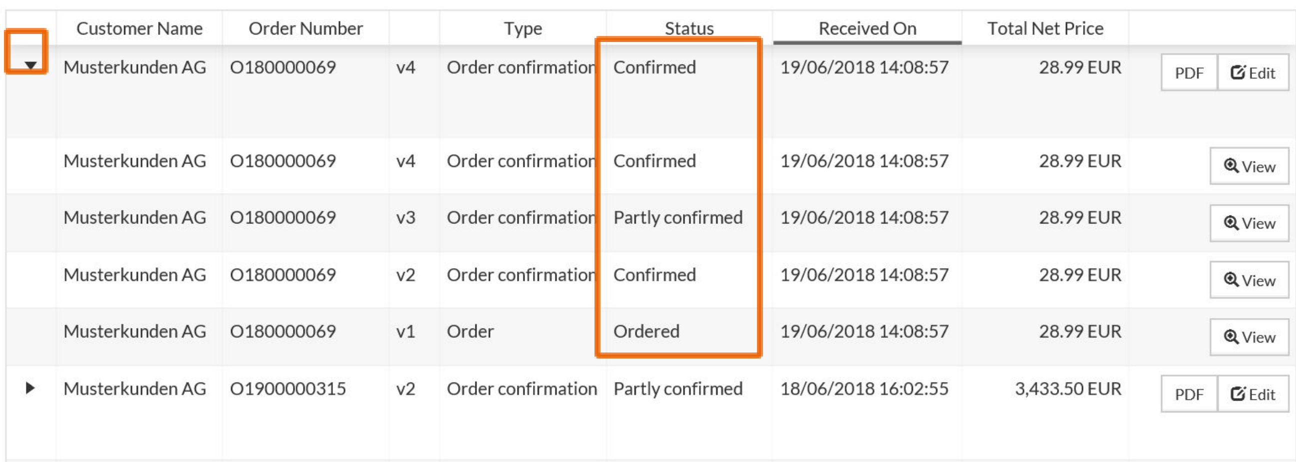
- ***Reported***: All service order rows have been handled, and reporting has been done.
- ***Partly reported***: Some of the service order rows have been handled.
- ***Invoiced***: You have sent the invoice to the buyer.
- ***Partly invoiced***: You have sent a partial invoice to the buyer.
- ***Delivered***: The buyer has signed the goods as received.
- ***Partly delivered***: The buyer has partially signed the goods as received.

By default, the orders are sorted from the newest to the oldest. You can sort the orders by type, customer name, order number, total net price or status by clicking the respective column name.

Furthermore, you can use one or more search criteria to easily find the desired order. After you have defined the criteria, click ***Search***. Only the orders matching your search criteria are shown until you click ***Reset***.



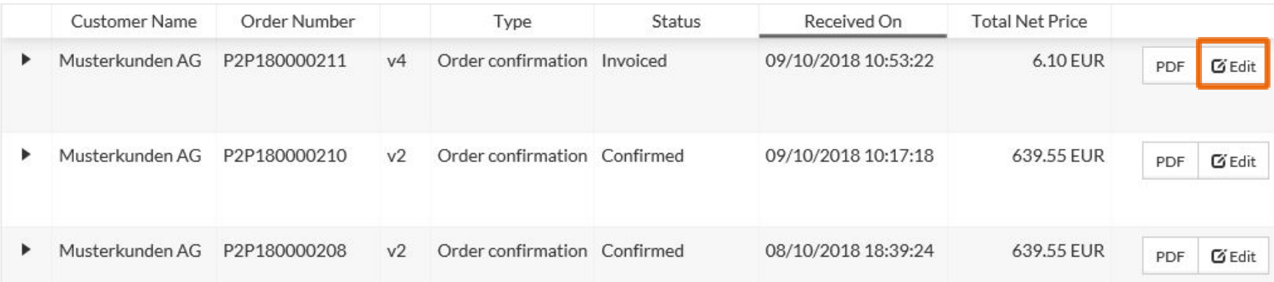
You can see the history of an order by clicking the ▶ button on the respective row.



If you want to view a purchase order as a PDF, click ***PDF***.

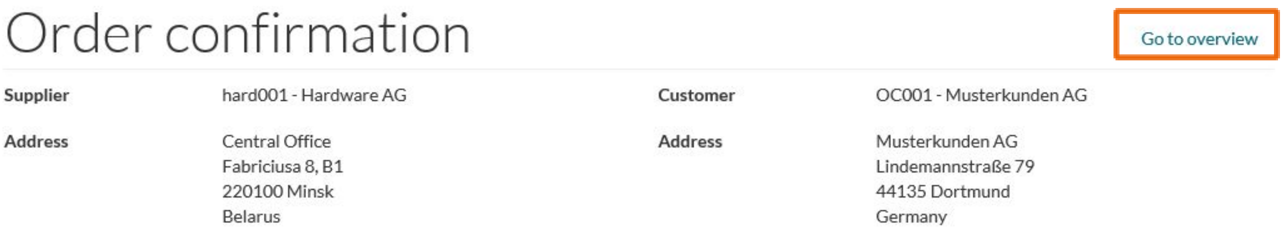
4.1 View order details

When you receive an order from your customer, you receive an email notification. The notification is also shown on the ***Home*** page. You can open the order by clicking the link in the email or on the ***Home*** page. Alternatively, select ***Orders*** / ***Overview***, find the desired order from the list and click ***Edit***.



After opening the order, you can export it to JSON or CSV by clicking ***Export*** and selecting the desired option. Furthermore, you can view the order as a PDF by clicking ***PDF Preview***.

You can close the order and go back to the list of purchase orders by clicking ***Go to overview***.



4.2 Confirm or reject purchase orders

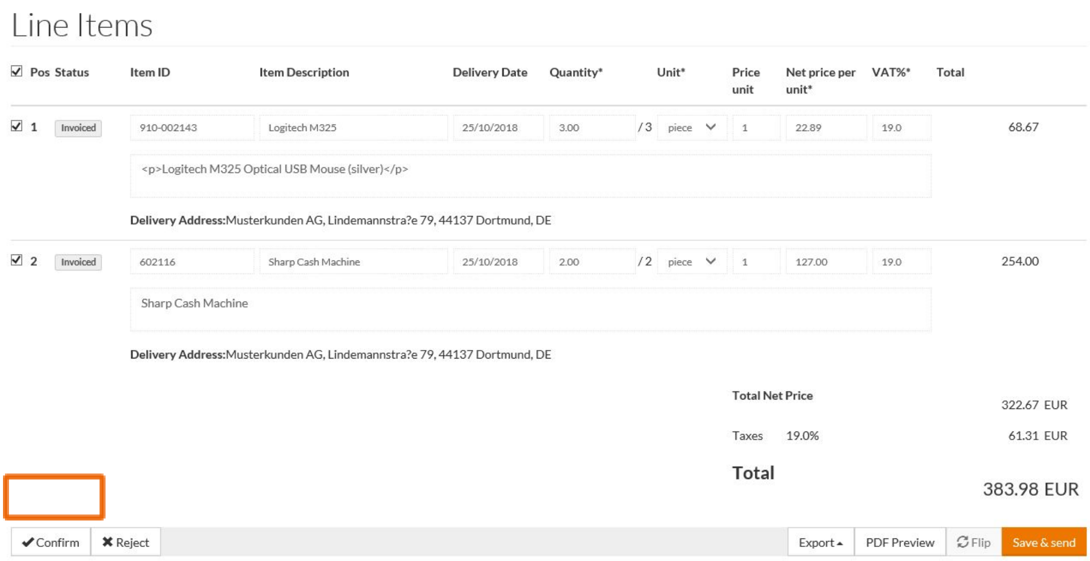
Before you can flip a purchase order into an invoice, you need to confirm it. Before confirming the purchase order, you can edit the line items as necessary (change the delivery date, for example), or add a comment.

If necessary, you can also reject line items or the whole purchase order.

Confirm or reject a purchase order as follows:

1. Click ***Orders***, and select ***Overview***. The ***Order Overview*** page opens.
2. For the order you want to confirm or reject, click ***Edit***. The ***Order*** page opens.
3. If you want to comment the purchase order, enter your comment in the ***Internal Comment*** field.

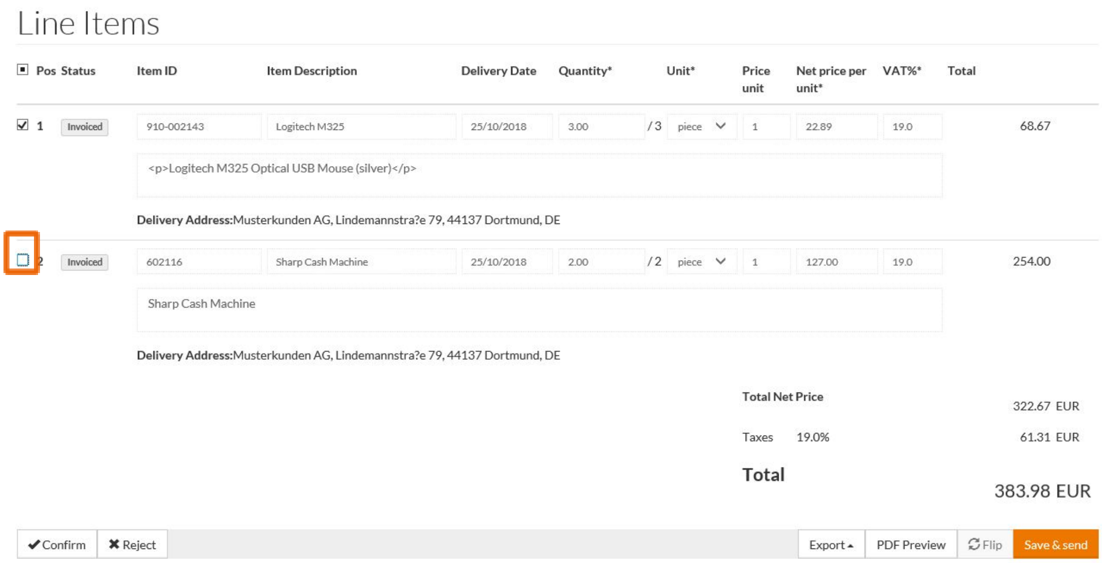
4. Below ***Line Items***, edit the order details as necessary:
    - In the ***Delivery Date*** fields, select the new dates from the calendars.
    - In the ***Quantity*** fields, edit the number of items. Note that you can only change the quantities to be smaller than originally.
    - In the ***Net price per unit*** fields, edit the prices of items. Note that you can only change the prices to be less than originally.
5. Below ***Line Items***, confirm of reject line items:
    - If you want to confirm all the line items, click ***Confirm***.



The statuses of the line items change from ***Ordered*** to ***Confirmed***.

- If you want to reject all the line items, click ***Reject***. The statuses of the line items change from ***Ordered*** to ***Rejected***.

- If you want to confirm only some of the line items, remove the checkmark by clicking on those rows you do not want to confirm.



Then click ***Confirm***. The statuses of the selected line items change from ***Ordered*** to ***Confirmed***.

- If you want to reject only some of the line items, remove the checkmark by clicking on those rows you do not want to reject. Then click ***Reject***. The statuses of the selected line items change from ***Ordered*** to ***Rejected***.

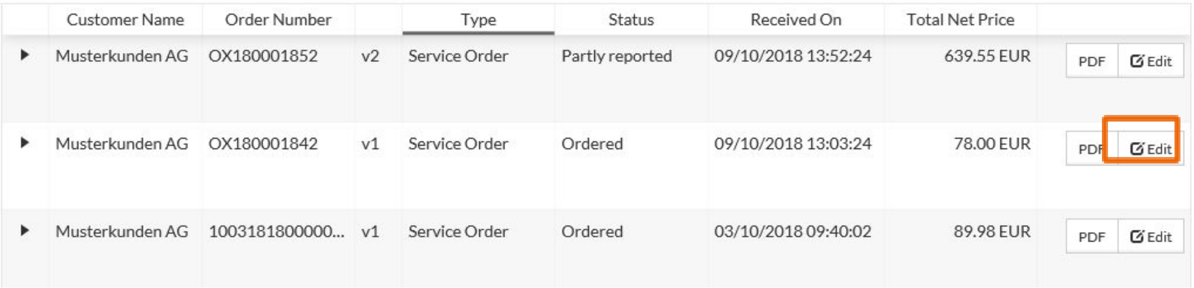
6. Click ***Save & send***. The order confirmation is sent to the customer. You can now flip the order into an invoice (see 4.3 Flip purchase orders into invoices).

4.3 Report efforts on service orders

When your customer buys services from you, you will receive a service order. When you have completed the service, you need to report it and the materials used to the buyer. After the buyer has approved your report, the type of the order is changed to ***Goods Receipt***, after which you can flip it into an invoice.

Report your efforts as follows:

1. Click ***Orders***, and select ***Overview***. The ***Order Overview*** page opens.
2. For the desired service order, click ***Edit***.



	Customer Name	Order Number		Type	Status	Received On	Total Net Price	
▸	Musterkunden AG	OX180001852	v2	Service Order	Partly reported	09/10/2018 13:52:24	639.55 EUR	PDF Edit
▸	Musterkunden AG	OX180001842	v1	Service Order	Ordered	09/10/2018 13:03:24	78.00 EUR	PDF Edit
▸	Musterkunden AG	1003181800000...	v1	Service Order	Ordered	03/10/2018 09:40:02	89.98 EUR	PDF Edit

   The ***Service Order*** page opens.

3. Click ***Report efforts***. The ***Service Entry Sheet*** opens.

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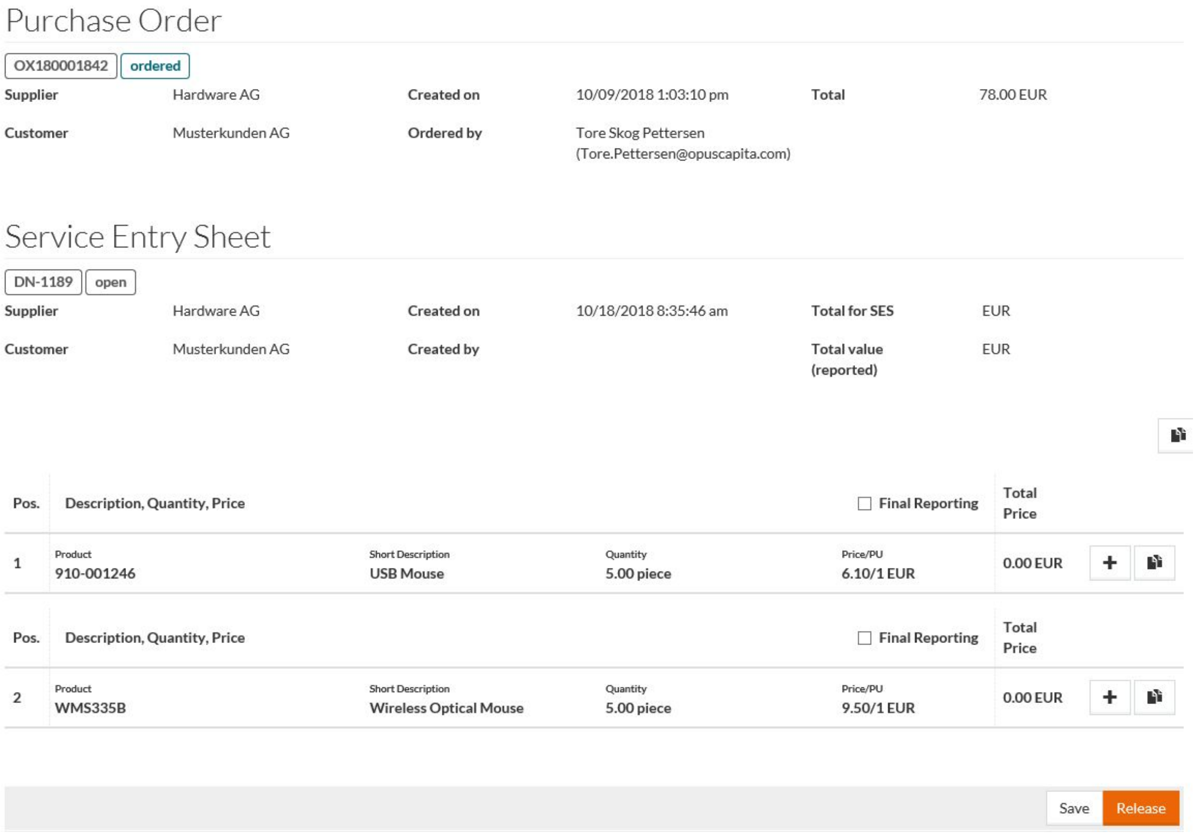
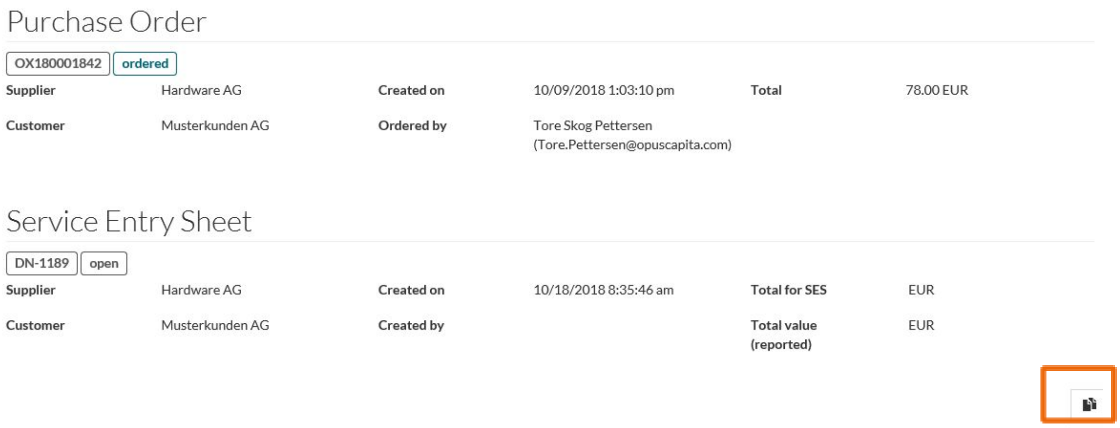


4. Report your services in one of the following ways:

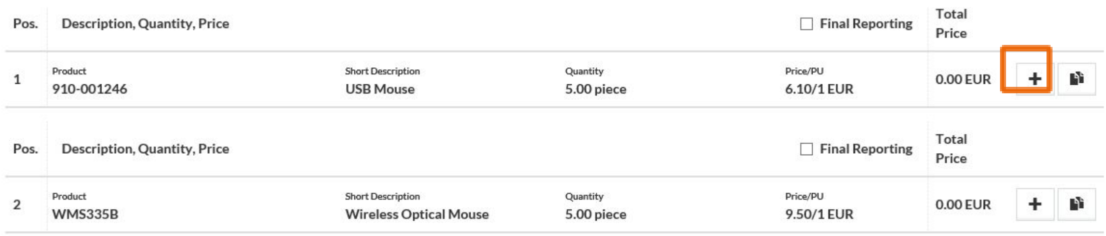
- If you want to report all the rows from the original service order, click the button in the ***Service Entry Sheet*** section.



All the rows from the service order are copied. Edit the data as necessary.

- If you only want to report some of the rows, click the button for the desired row. The row is copied from the service order. Edit the data as necessary.

- If you want to report a service that is not included in the original service order, click the + button for the desired product.



The fields open for editing. Define the details as follows:

In the ***Product*** field, click and select the desired product from the list. You can also filter the products by starting to type the product ID in the field.

After you select the product, the ***Short Description*** and ***Price/PU*** fields are added with information from the product catalog.

- In the ***Quantity*** field, enter the number of items.
- In the ***Period of Service*** field, select when the service was done.
- In the ***Performed By*** field, enter your name.
- If necessary, enter a note in the ***Notes*** field.

5. Click ***Release***. The status of the service order is now ***Reported***, and the buyer receives your report. After the buyer has approved your report, the type of the order is changed to ***Goods Receipt***, after which you can flip it into an invoice (see 4.4 Flip purchase orders into invoices).

4.4 Flip orders into invoices

Before you can flip a purchase order into an invoice, you need to confirm it (see 4.2 Confirm or reject purchase orders). After confirming the purchase order, you can flip the order into an invoice right away or at a later stage. You can then either save the invoice as a draft or save the invoice and send it automatically via the messaging platform.

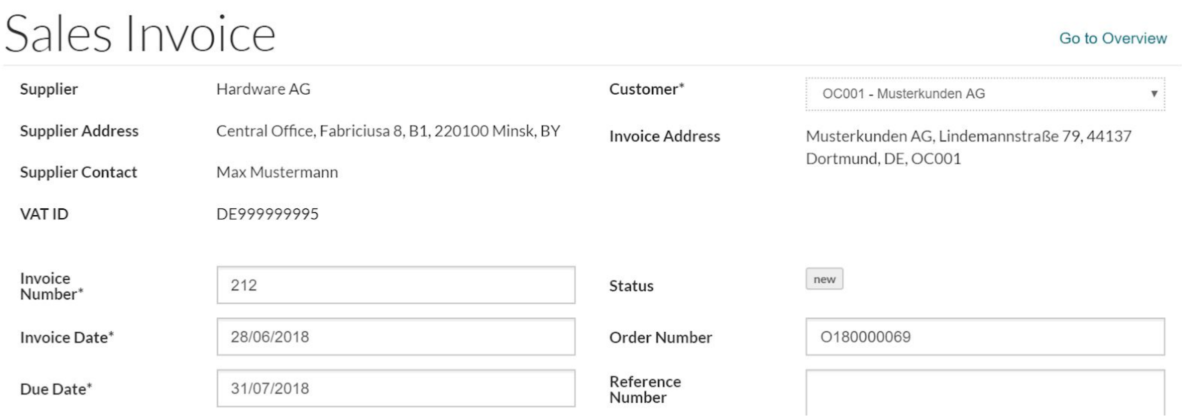
After you have reported your service efforts to a buyer (see 4.3 Report efforts on service orders) and the buyer has approved your report, the service order is changed to a goods receipt, after which you can flip it into an invoice.

Flip an order into an invoice as follows:

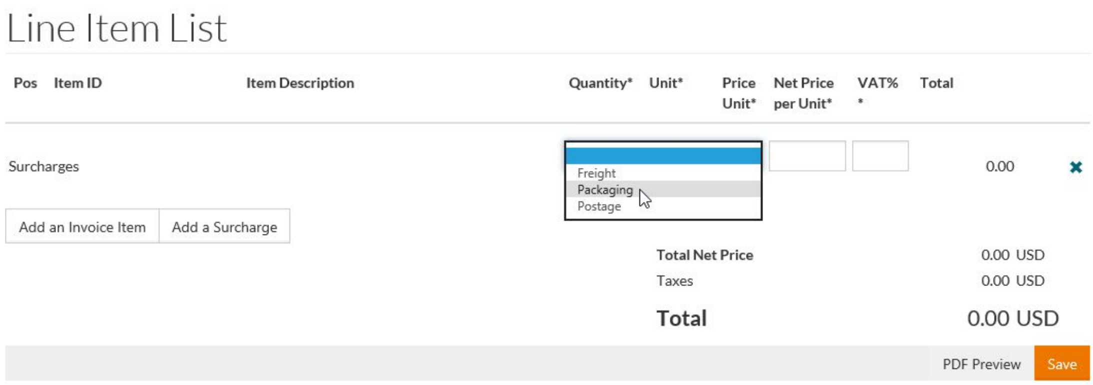
1. Click ***Orders***, and select ***Overview***. The ***Order Overview*** page opens.
2. For the desired confirmed purchase order or a goods receipt, click ***Edit***. The ***Order Confirmation*** or ***Goods receipt*** page opens.
3. Click ***Flip***.

The ***Sales Invoice*** page opens, with the details from the purchase order or the goods receipt. The due date is automatically calculated based on the term of payment.

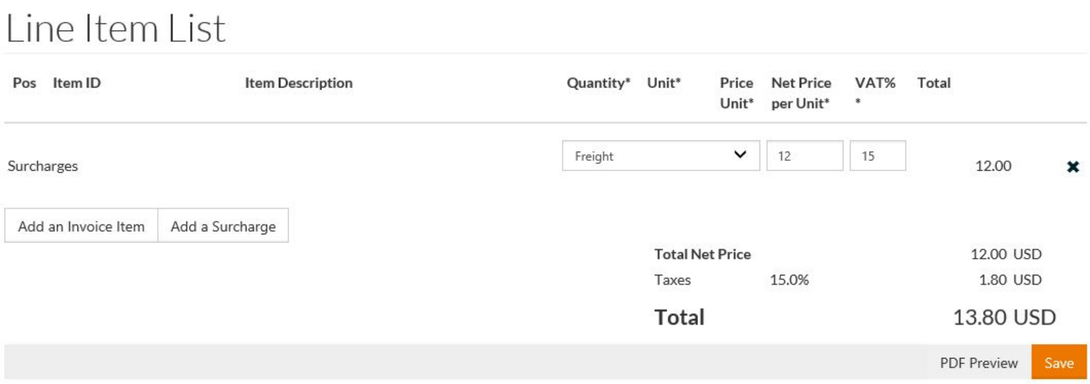
4. In the ***Invoice Number*** field, enter a unique, continuous invoice number.



5. If necessary, add a bank payment reference in the ***Bank Payment Reference*** field, a reference number in the ***Reference Number*** field or a comment in the ***Comment*** field.
6. Below ***Line Item List***, define custom clearance number or country of origin, if necessary.
7. If necessary, enter surcharges as follows:
    a. Below ***Line Item List***, click ***Add a Surcharge***. The surcharge-related fields open for editing.
    b. From the drop-down menu in the first field, select the type for the surcharge: ***Freight***, ***Packaging*** or ***Postage***.



    c. In the second field, enter the price per unit.
    d. In the third field, enter the VAT percentage.



8. Click ***Save***. The ***Save or Save and Send*** window opens.
9. If you want to send the invoice to the customer, click ***Save & Send***. Otherwise, click ***Save***.

5. Invoices

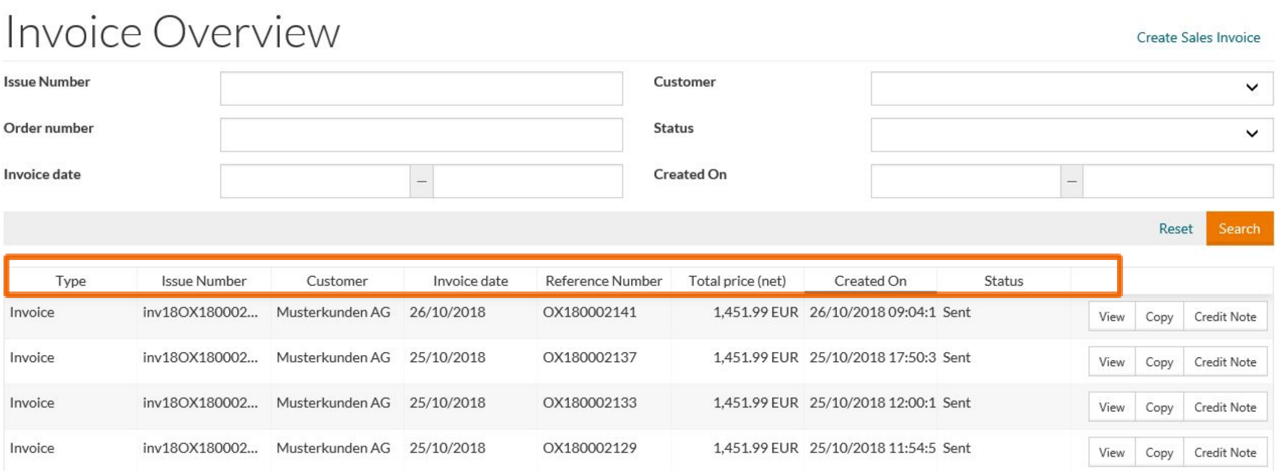
On the ***Invoice*** / ***Overview*** page, you can view your invoices and credit notes. You can also copy invoices and create credit notes. On the ***Invoice*** / ***Key-In*** page, you can add new sales invoices.

The status of an invoice is one of the following:

- ***draft***: The invoice has not been sent. You can edit the invoice or copy it.
- ***sending***: The invoice is being sent.
- ***sent***: The invoice has been sent to the customer. You can view the invoices by clicking the button. You can also copy the invoice or create a credit note based on it.

By default, the invoices are sorted from the newest to the oldest. You can sort the invoices by type, issue number (= invoice number), customer, invoice date, reference number, total net price or status by clicking the respective column name.

Furthermore, you can use one or more search criteria to easily find the desired invoice. After you have defined the criteria, click ***Search***. Only the invoices matching your search criteria are shown until you click ***Reset***.



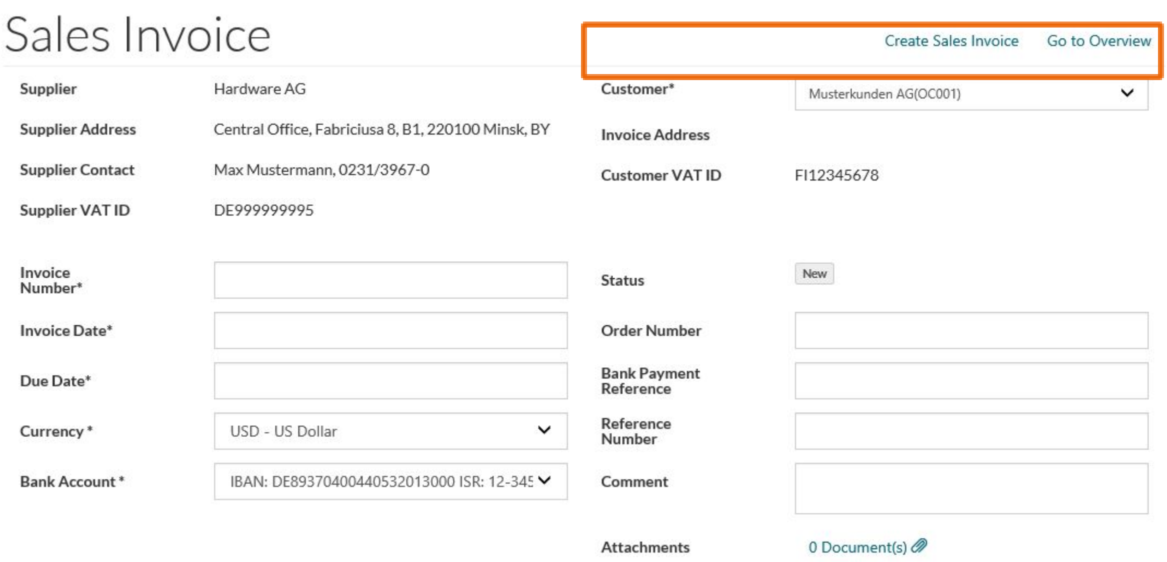
If you want to view a specific invoice, click ***View***.

5.1 Add sales invoices

If necessary, you can manually add sales invoices to the buyers who you have connected with in the application.

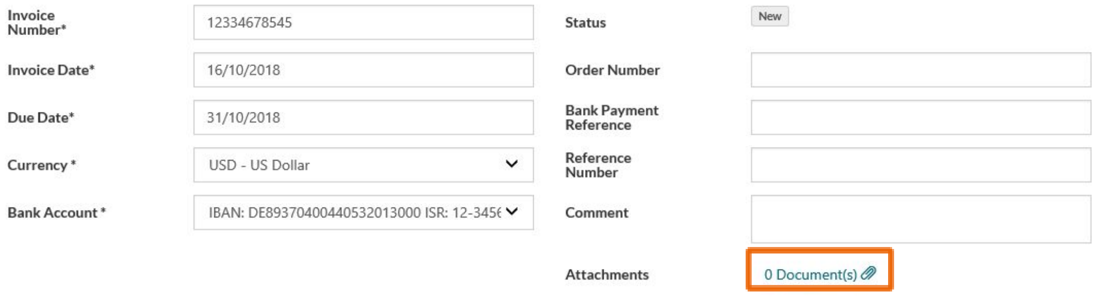
Add a sales invoice as follows:

1. Open the sales invoice form in one of the following ways:
   - Click ***Invoice*** and select ***Overview***. The ***Invoice Overview*** page opens. Click ***Create Sales Invoice***. The ***Sales Invoice*** page opens.
   - Click ***Invoice*** and select ***Key-In***. The ***Sales Invoice*** page opens.
2. From the ***Customer*** drop-down menu, select the desired customer.

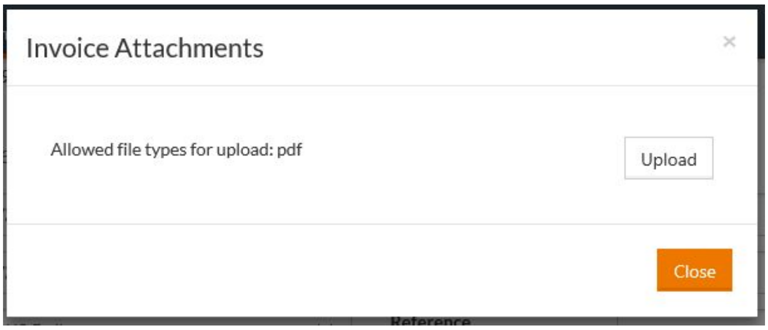


3. In the ***Invoice Number*** field, enter a unique, continuous invoice number.
4. Click the ***Invoice Date*** field, and select the invoice date.
5. Click the ***Due Date*** field, and select the due date.
6. From the ***Currency*** drop-down menu, select the desired currency.
7. From the ***Bank Account*** drop-down menu, select the desired bank account.
8. Enter other data as necessary.
   - In the ***Bank Payment Reference*** field, you can enter the supplier's reference.
   - In the ***Reference Number*** field, you can enter the buyer's reference.

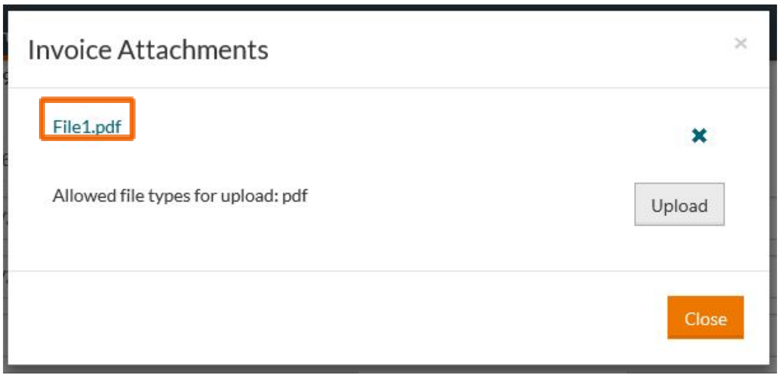
9. Add PDF attachments as follows:
   a. Click the ***0 document(s)*** link.



   The ***Invoice Attachments*** window opens.



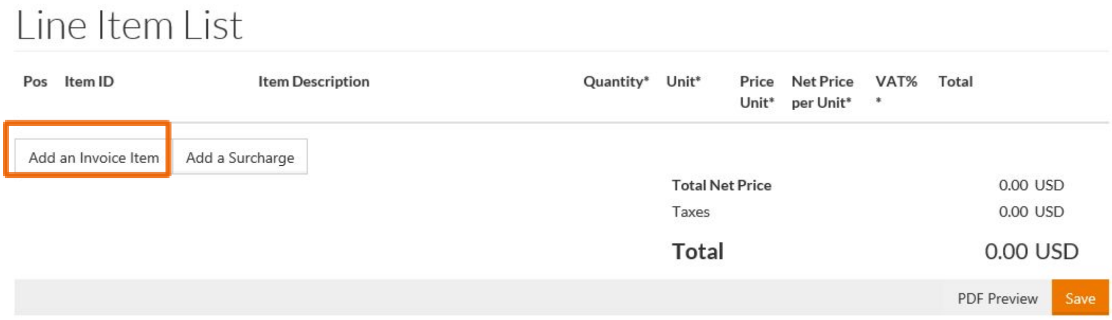
   Note that you need to save the invoice before adding attachments.
   b. Click ***Upload***.
   c. Browse to the desired directory and add the attachment by clicking ***Open***. The file is added for the invoice.



   If necessary, you can remove the attachment by clicking the ✖ button. You can also add another attachment by clicking ***Upload*** again.
   d. After adding all attachments, click ***Close***.

10.

e. Below ***Line Item List***, click ***Add an Invoice Item***.



The first line item is shown with fields open for editing.

f. In the ***Item ID*** field, enter an ID for the item.

g. In the ***Item Description*** field, enter a description for the item.

h. In the ***Quantity*** field, enter the number of items.

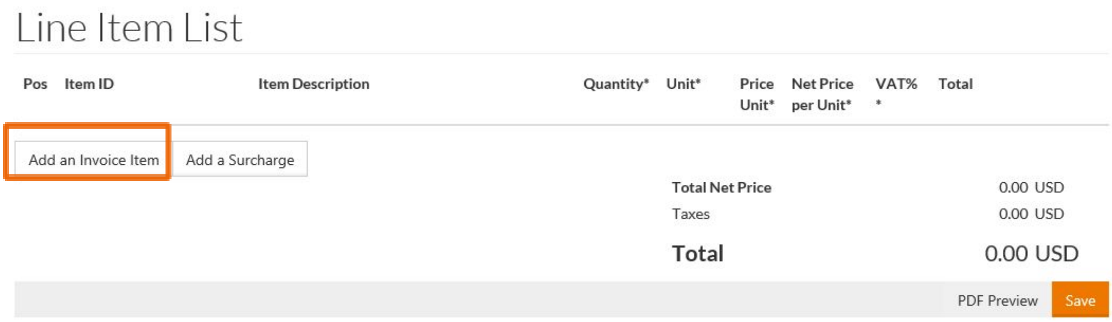
i. From the ***Unit*** drop-down menu, select the correct unit.

j. In the ***Net Price Per Unit*** field, enter the price for one unit.

k. In the ***VAT%*** field, enter the VAT percentage.

10. Enter a line item as follows:

l. Below ***Line Item List***, click ***Add an Invoice Item***.



The first line item is shown with fields open for editing.

m. In the ***Item ID*** field, enter an ID for the item.

n. In the ***Item Description*** field, enter a description for the item.

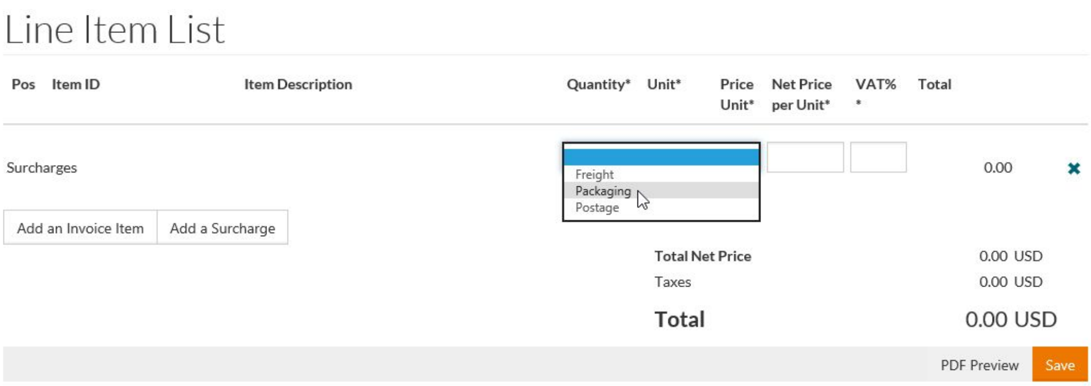
o. In the ***Quantity*** field, enter the number of items.

p. From the ***Unit*** drop-down menu, select the correct unit.

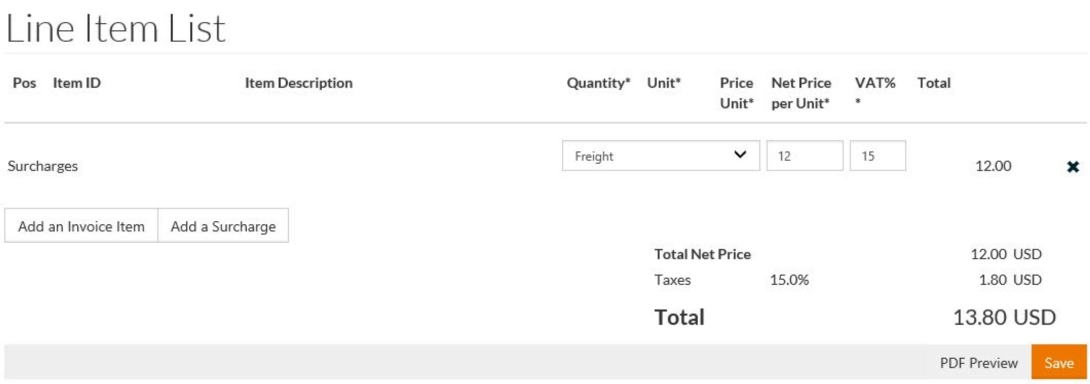
q. In the ***Net Price Per Unit*** field, enter the price for one unit.

r. In the ***VAT%*** field, enter the VAT percentage.

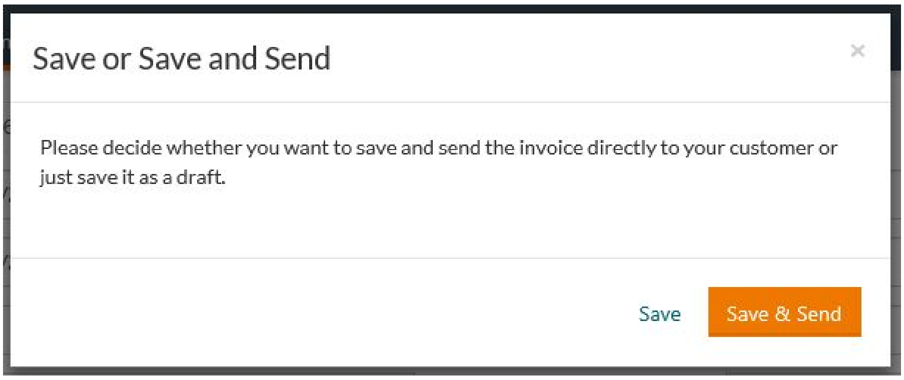
11. Add all the line items as described.
12. If necessary, enter surcharges as follows:
    e. Below ***Line Item List***, click ***Add a Surcharge***. The surcharge-related fields open for editing.
    f. From the drop-down menu in the first field, select the type for the surcharge: ***Freight***, ***Packaging*** or ***Postage***.



g. In the second field, enter the price per unit.
h. In the third field, enter the VAT percentage.



13. Add all the surcharges as described.
14. Click ***Save***. The ***Save or Save and Send*** window opens.



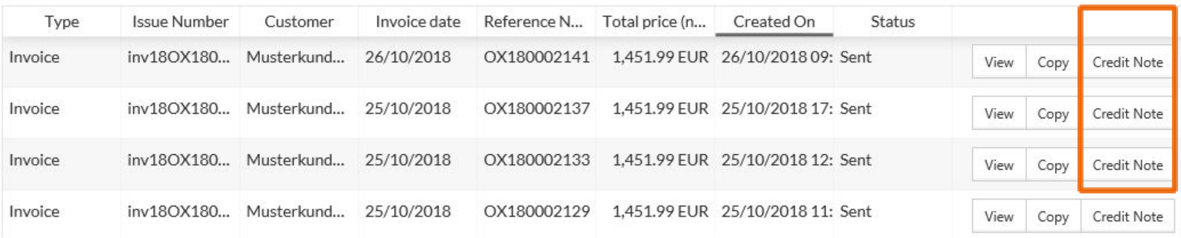
15. If you want to send the invoice to the customer, click ***Save & Send***. Otherwise, click ***Save***.

5.2 Create credit notes

You can create credit notes based on invoices sent to the customers. The credit note includes all invoice information, and it is allocated based on the invoice number.

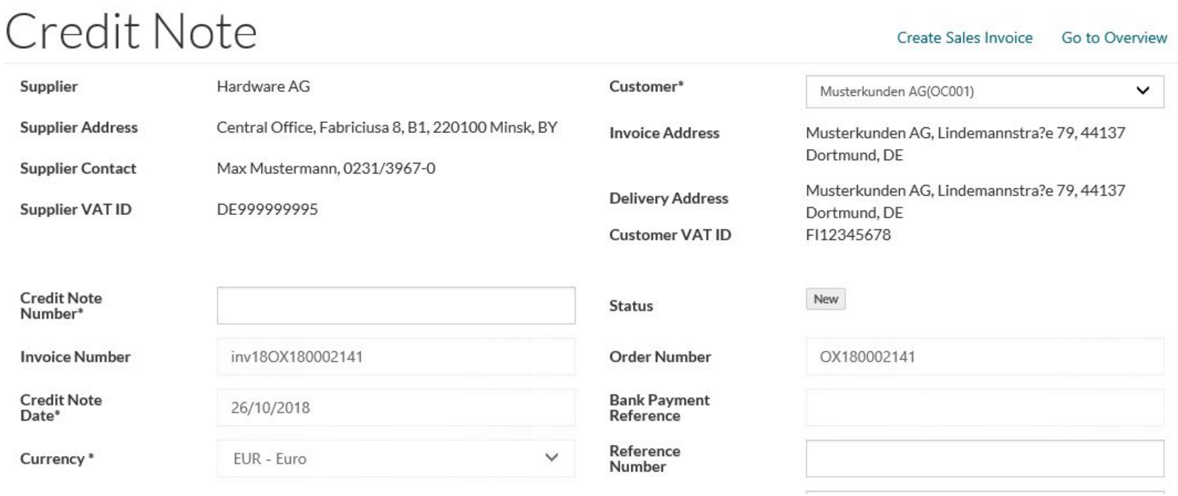
Create a credit note as follows:

1. Click ***Invoice***, and select ***Overview***. The ***Invoice Overview*** page opens.
2. For the desired sent invoice, click ***Credit Note***.



Type	Issue Number	Customer	Invoice date	Reference N...	Total price (n...	Created On	Status			
Invoice	inv18OX180...	Musterkund...	26/10/2018	OX180002141	1,451.99 EUR	26/10/2018 09:	Sent	View	Copy	Credit Note
Invoice	inv18OX180...	Musterkund...	25/10/2018	OX180002137	1,451.99 EUR	25/10/2018 17:	Sent	View	Copy	Credit Note
Invoice	inv18OX180...	Musterkund...	25/10/2018	OX180002133	1,451.99 EUR	25/10/2018 12:	Sent	View	Copy	Credit Note
Invoice	inv18OX180...	Musterkund...	25/10/2018	OX180002129	1,451.99 EUR	25/10/2018 11:	Sent	View	Copy	Credit Note

The ***Credit Note*** page opens.



3. In the ***Credit Note Number*** field, enter a unique, continuous credit note number.
4. Click ***Save***. The ***Save or Save and Send*** window opens.
5. If you want to send the credit note to the customer, click ***Save & Send***. Otherwise, click ***Save***.

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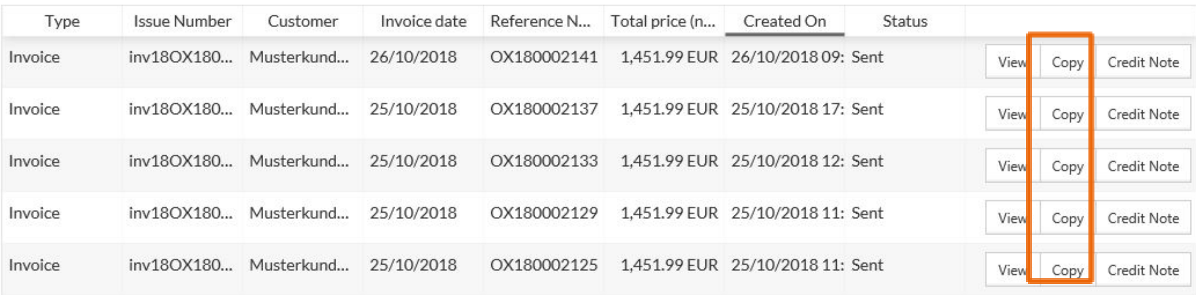
5.3 Copy invoices

Copy an invoice as follows:

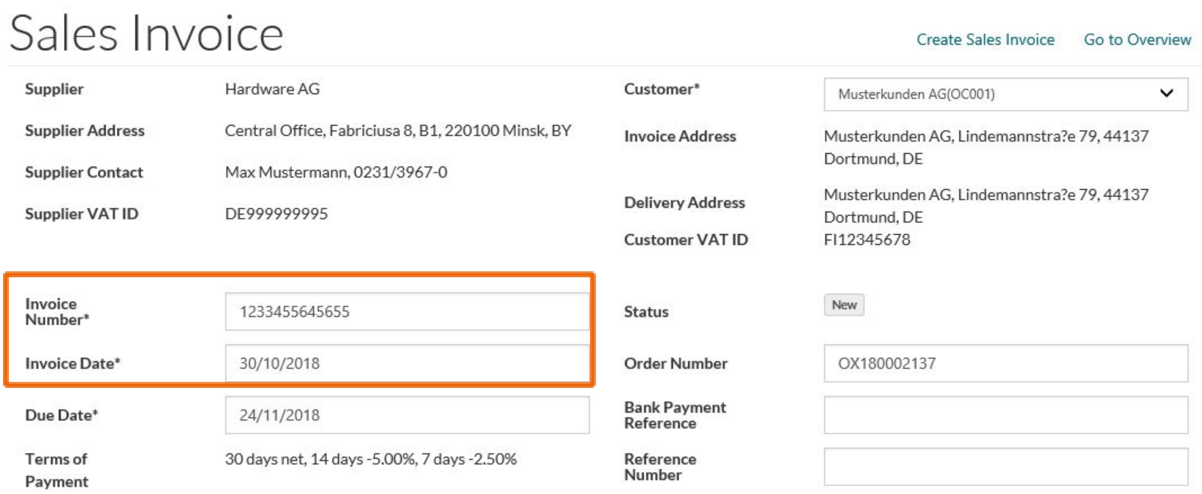
1. Click ***Invoice***, and select ***Overview***. The ***Invoice Overview*** page opens.
2. For the desired invoice, click ***Copy***.



Type	Issue Number	Customer	Invoice date	Reference N...	Total price (n...	Created On	Status			
Invoice	inv18OX180...	Musterkund...	26/10/2018	OX180002141	1,451.99 EUR	26/10/2018 09:	Sent	View	Copy	Credit Note
Invoice	inv18OX180...	Musterkund...	25/10/2018	OX180002137	1,451.99 EUR	25/10/2018 17:	Sent	View	Copy	Credit Note
Invoice	inv18OX180...	Musterkund...	25/10/2018	OX180002133	1,451.99 EUR	25/10/2018 12:	Sent	View	Copy	Credit Note
Invoice	inv18OX180...	Musterkund...	25/10/2018	OX180002129	1,451.99 EUR	25/10/2018 11:	Sent	View	Copy	Credit Note
Invoice	inv18OX180...	Musterkund...	25/10/2018	OX180002125	1,451.99 EUR	25/10/2018 11:	Sent	View	Copy	Credit Note

The ***Sales Invoice*** page opens.

3. In the ***Invoice Number*** field, enter a unique, continuous invoice number.
4. Click the ***Invoice Date*** field, and select the invoice date.



5. Change other data as necessary.
6. Click ***Save***. The ***Save or Save and Send*** window opens.
7. If you want to send the invoice to the customer, click ***Save & Send***. Otherwise, click ***Save***.

6. Archive

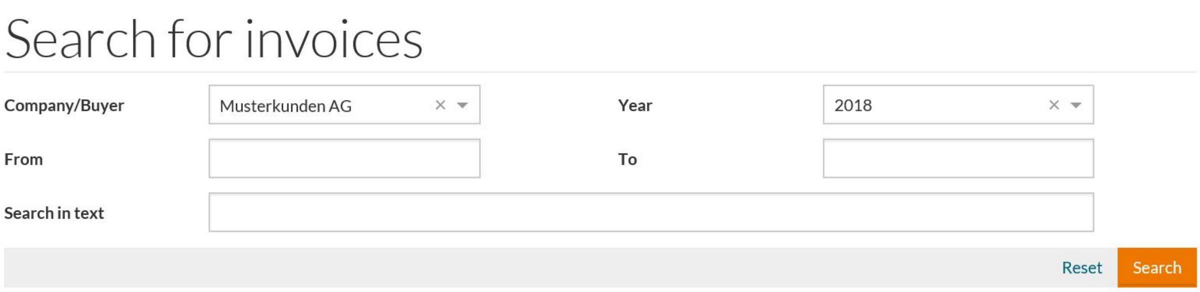
When email archiving is in use, the invoice files attached in emails are stored into the archive. The invoices are archived in their original format extracted from the email. The metadata, such as the email sender and date and time stamps, are also stored.

When the archive is taken into use, a key user is added into the system. The key user can then add additional users. New users receive an email with instructions for finalizing their registration.

The invoices are available for viewing in the archive according to regional laws. The archived invoices can be accessed as read only.

Search for an archived invoice and view it as follows:

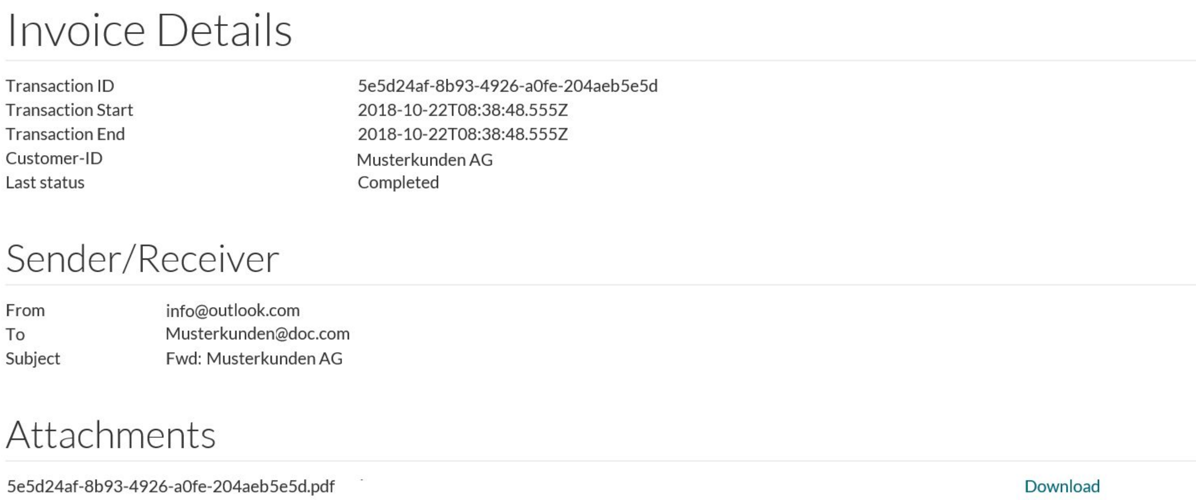
1. On the ***Search for invoices*** page, select the desired company from the ***Company/Buyer*** drop-down menu.
2. From the ***Year*** drop-down menu, select the archiving year. The ***From***, ***To*** and ***Search in text*** fields are shown.



3. If you want to refine your search, do as follows:
   - If you want to search for invoices from a specific period, click in the ***From*** and ***To*** fields and select the date range from the calendars.
   - If you want to search for a specific text, enter it in the ***Search in text*** field.
4. Click ***Search***. The invoices matching your search criteria are shown.
   - ***Transaction Id***: OpusCapita Solutions transaction ID for the invoice
   - ***Start date***: The date when the invoice was received
   - ***Sender Email***: The email address of the issuer of the email
   - ***Status***: The status of the transaction in OpusCapita

   If you want to search with other criteria, click ***Reset*** to clear the fields.

5. Click the link for the desired invoice. The invoice opens showing the details.



If you want to open the invoice as an PDF, click ***Download***.

7. Catalog

To enable ordering via eProcurement, the customers need the catalogs.

Upload catalogs for a customer as follows:

1. Click ***Catalog***, and select ***Upload***. The ***Catalog Upload*** page opens.
2. Select the desired customer from the drop-down menu. This will take you to Self Service Manager.

   For more information, click your username in the upper right corner and select ***Help***.