

# Liaison eInvoicing Portal User Manual

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# Introduction

The *Liaison eInvoicing Portal User Manual* describes features and functions of Liaison eInvoicing Portal.

## Terms and Abbreviations

Term	Explanation
Captcha	“Completely Automated Public Turing test to tell Computers and Humans Apart”
Customer	Recipient of the invoice
Draft	Invoice that is not sent and saved as a draft
eInvoice	Electronic Invoice
eInvoicing	Electronic invoicing, i.e., sending electronic invoices
Invoice sender	Company sending invoice, i.e., company that is using eInvoicing Portal
Template	Prefilled invoice creation form
UI	User Interface

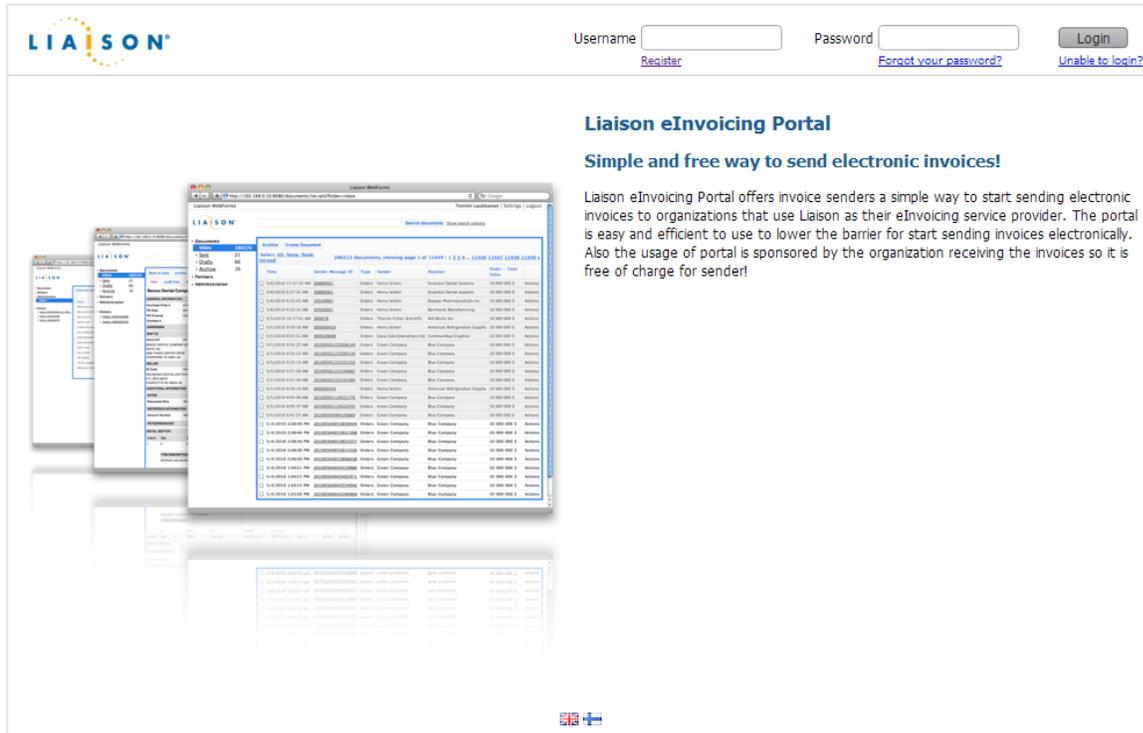
## Portal Overview

Liaison eInvoicing Portal offers invoice senders a simple way to start sending electronic invoices to organizations that use Liaison as their eInvoicing service provider. The Portal is easy to use and efficient, thus simplifying the process of sending invoices electronically.

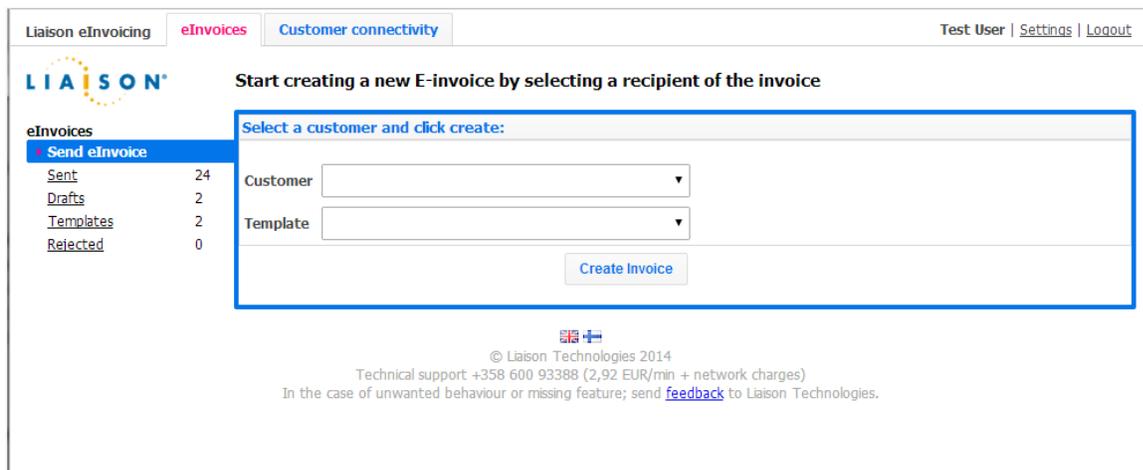
The usage of the Portal is sponsored by the organization receiving the invoices, so it is free of charge for the invoice sender.

## UI Overview

You can register or log in to your account on the front page of Liaison eInvoicing Portal.

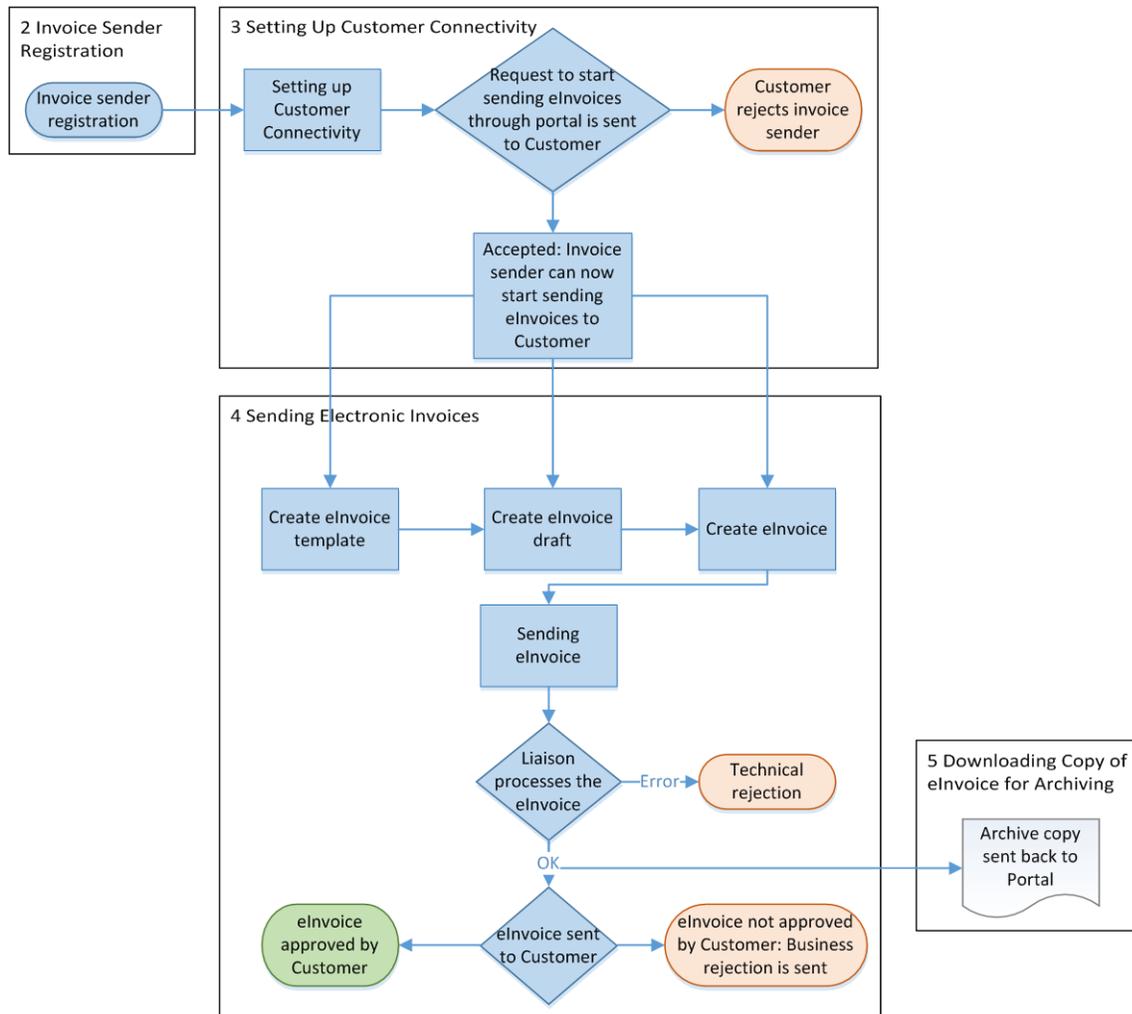


After you log in, the main page displays.



## Portal Functionalities

The flow chart below illustrates the Portal functionalities and their order in the eInvoicing process.



These functionalities and the steps that need to be performed are described in the following sections:

- *Invoice Sender Registration*
- *Setting Up Customer Connectivity*
- *Sending Electronic Invoices*
- *Downloading Copy of eInvoice for Archiving*

# Registering the Invoice Sender

Follow the steps below to register your company as an invoice sender.

1. Click the **Register** link on the Portal front page. The registration form opens.

2. Fill out the registration form.

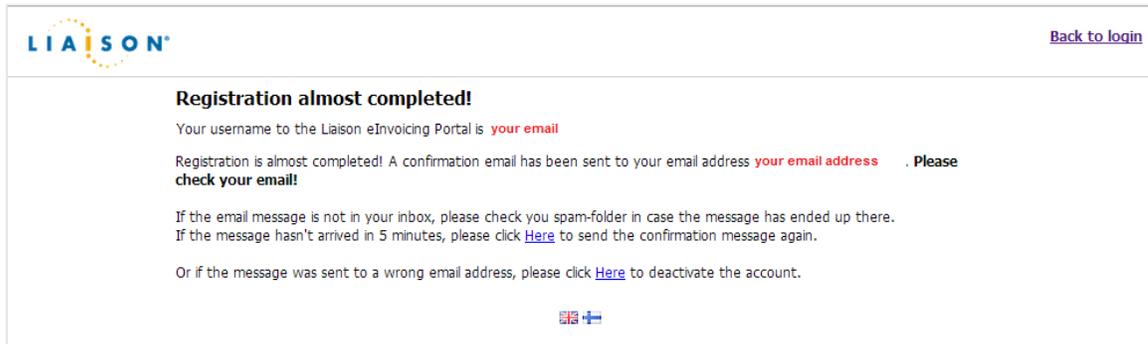
Fields that are marked with red star (\*) character are required. Each field is described in a table below.

Field name	Description	Mandatory
Organization name	Organization's official full name	Yes

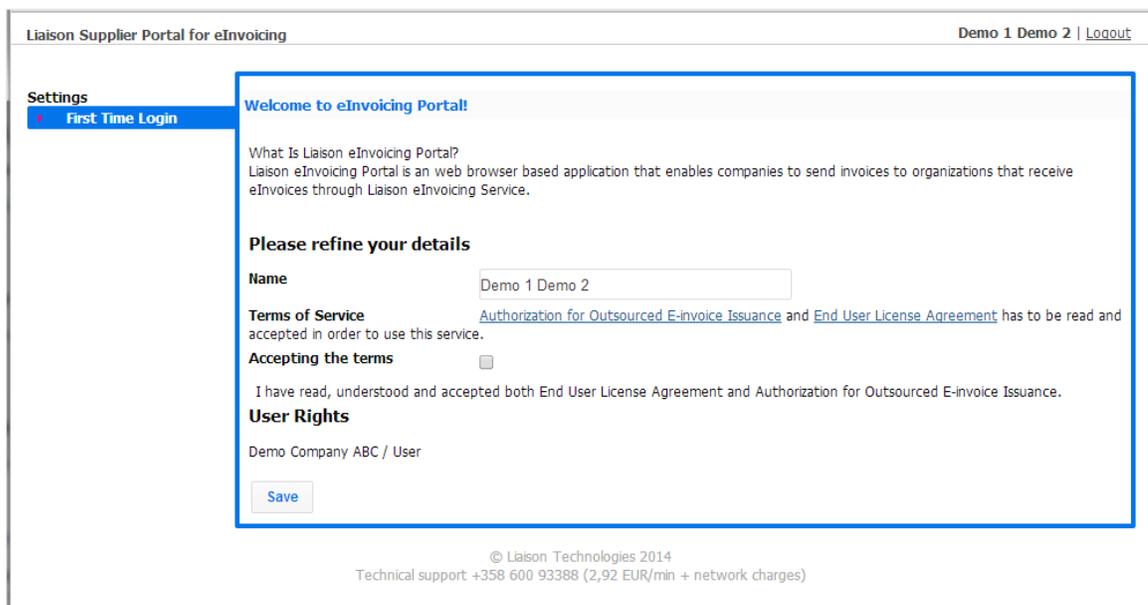
Field name	Description	Mandatory
Organization ID	Official identifier of the organization that is required by local laws to be on invoice. VAT identifier is recommended.	Yes
eInvoicing Address	The organization's address that it uses for sending or receiving electronic invoices	No
Sales tax number	The organization's sales tax number	No
Street	Street address of organization	Yes
City	City of organization	Yes
Postal Code	Postal Code of organization	Yes
State/province	State or province of organization	No
Country	Home country of organization	Yes
First name	First name of Portal user	Yes
Last name	Last name of Portal user	Yes
Telephone number	Telephone number of Portal user	No
Email address	Email address of Portal user. This email address is used for all communication from Portal to user so it is important that this address is correct.	Yes
Re-enter email	Confirmation of user's email address	Yes
Password	User's password to Portal	Yes
Re-enter password	Confirmation of user's password	Yes

3. After you have entered all mandatory fields on the registration form, ensure that you are really a human and not a computer bot by entering the Captcha value from the Captcha image in the text box at the bottom of the page.
4. Continue the registration process by clicking the **Register** button. If any mandatory values are missing, you are unable to continue the registration process until you have filled all missing mandatory fields, which are highlighted in red.

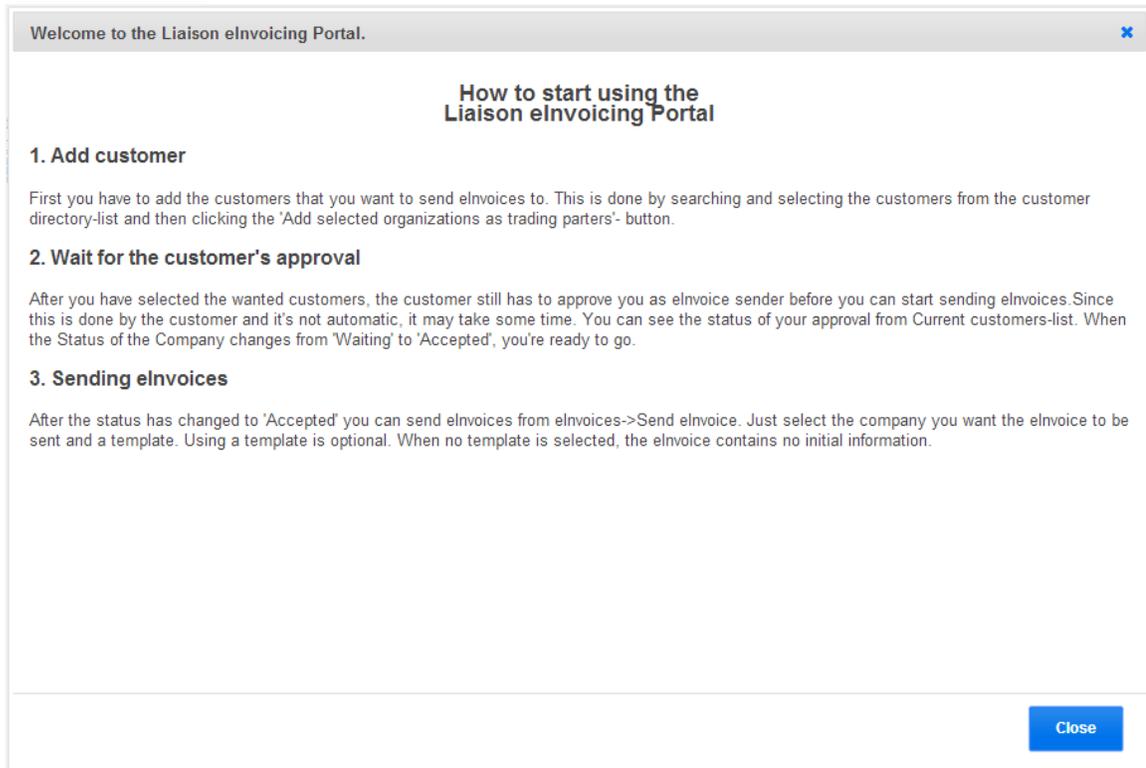
- You are prompted to confirm your email address. This is done with an automatic email message that is sent to the email address you provided earlier.



- Check your email for the confirmation message. Sometimes the confirmation email may take up to 30 minutes to arrive, so please be patient. If the email hasn't arrived, check your spam folder as your spam filter may have flagged the confirmation email and forwarded it to the spam folder.
- When the confirmation email has arrived, click the link shown in the email to confirm the email address.
- Log in to the portal. When you log in for the first time, you are requested to review and accept the terms of service. The terms of service consist of two documents: *Authorization for Outsourced E-invoice Issuance* and *End User Licence Agreement*. These documents can be read and printed by clicking the links with the documents' names.



9. Accept the terms of service and click the **Save** button. Registration is completed and you are forwarded to the Portal; a pop-up window displays to help you get started with using the Portal.



## Setting Up Customer Connectivity

After registering for the Portal, first thing you need to do is to set up connections with companies that your organization wants to send electronic invoices to. The process for setting up customer connectivity is described in the following sections.

### Selecting Your Customers

To set up customer connections, select the desired recipients from the **Customer directory** list and click the **Add selected organizations as trading partners** button. The **Customer directory** list is shown as a screenshot below.

The screenshot displays the 'Customer directory' section of the Liaison eInvoicing portal. The page has a navigation bar with 'Liaison eInvoicing', 'eInvoices', and 'Customer connectivity' tabs. The 'Customer connectivity' tab is active. The main content area is titled 'Available Trading Partners' and includes a search bar, a table of partners, and a button to add selected organizations as trading partners. The table has columns for 'Select', 'Company name', 'VAT', and 'Country'. One partner is listed: 'TestBuyer TR' with VAT '91287256234' and Country 'Finland'. The page also shows pagination information: 'Results per page: 10' and '< Previous 11 - 11 of 11'. The footer contains copyright information for Liaison Technologies 2014 and technical support details.

Select	Company name	VAT	Country
<input type="checkbox"/>	TestBuyer TR	91287256234	Finland

### Waiting for Customer Responses

After you have added the customers or trading partners you want to send electronic invoices to, a request to approve a new invoice sender (your organization) is sent to these customers.

Before a customer has approved your organization as a new invoice sender, the customer is shown in the **Current customers** list with a **Waiting** status as shown in the screenshot below.

The screenshot displays the 'Customer connectivity' section of the Liaison eInvoicing portal. At the top, there are navigation tabs for 'Liaison eInvoicing', 'eInvoices', and 'Customer connectivity'. The user is logged in as 'Demo 1 Demo 2' and can access 'Settings' or 'Logout'. The 'LIAISON' logo is visible in the top left. A sidebar on the left contains 'Partners' with sub-options 'Current customers' (highlighted) and 'Customer directory'. The main content area features a 'Search customers:' input field. Below it, a 'Current customers:' section shows a table with one entry. The table has columns for 'Company name', 'VAT', 'Country', and 'Status'. The entry is 'TestBuyer TR' with VAT '91287256234', Country 'Finland', and Status 'Waiting'. The table indicates 'Results per page: 10' and '1 - 1 of 1'. At the bottom, there is copyright information for Liaison Technologies 2014, technical support details, and a feedback link.

Company name	VAT	Country	Status
TestBuyer TR	91287256234	Finland	Waiting

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After the customer has approved your organization as a new invoice sender, its status in the **Current customers** list changes to **Accepted** and a notification of this status change is sent to your email. If the customer does not accept your request, the rejection is also shown in the list and a rejection notification is sent to your email.

After the customer has approved your organization as a new invoice sender, you can start to create electronic invoices in the Portal.

# Sending Electronic Invoices

Sending electronic invoices is the primary functionality of the Portal. Before you can send invoices, you need to successfully register your organization in the Portal as described in the *Invoice Sender Registration* section and successfully set up customer connectivity as described in the *Setting Up Customer Connectivity* section.

## Invoice Recipient Selection

Follow the steps below to select an invoice recipient.

1. On the **Send eInvoice** view, select the recipient from the **Customer** dropdown list. All customers that have completed the customer connectivity setup process are listed.

The screenshot shows the 'Send eInvoice' interface. On the left, a sidebar lists 'eInvoices' with a sub-menu for 'Send eInvoice' and a table of statistics: Sent (24), Drafts (2), Templates (2), and Rejected (0). The main content area is titled 'Start creating a new E-invoice by selecting a recipient of the invoice' and contains a form with a 'Customer' dropdown, a 'Template' dropdown, and a 'Create Invoice' button. A blue box highlights the form area.

2. Select a template (a prefilled invoice creation form) for the invoice from the **Template** dropdown list. Selection of a template is **not** mandatory. Templates are described in the *eInvoice Templates* section.
3. Once the customer and optional template have been selected, click the **Create Invoice** button and fill out the Invoice Creation Form.

## Invoice Creation Form

You create the invoice using Invoice Creation Form, as shown in the screenshot below. The Invoice Creation Form is customized for each receiver to ensure that the invoice content meets the receiver's requirements. As such, fields and content of the invoice form are not described here.

Liaison eInvoicing | eInvoices | Customer connectivity | Test User | Settings | Logout

**LIAISON**

eInvoices  
 Send eInvoice 24  
 Drafts 2  
 Templates 2  
 Retected 0

Cancel Validate Save to Drafts Save to Templates Send Recalculate

Invoice from Test Supplier B to Test Buyer A Created at 27.8.2014 12:07:21

Edit

**Default Invoice**

GENERAL INFORMATION

Invoice number [ ] Release number [ ]  
 Invoice Date [ ] Number of Line Items 1  
 Purchase Order number [ ] Total VAT amount 0.0 €  
 PO Date [ ] Total Amount Excluding Taxes 0.0 €  
 Reference number [ ] Total Invoice Amount 0.0 €

PARTY ADDRESS INFORMATION

BILLER CUSTOMER  
 Name Test Supplier B Name Test Buyer A  
 Address 1 Katu Address 1 Patamienkatu 7  
 Address 2 Address 2  
 City Kaupunki City Tampere  
 State/Region State/Region  
 Postal Code 12345 Postal Code 33900  
 Country FI Country FI

PARTY INFORMATION

Bill Details Customer Details  
 Biller VAT number F1ESTB888 Customer VAT number F1ESTTEST  
 Biller IBAN Customer eInvoicing address 0037TESTEST

ADDITIONAL INFORMATION

TERMS Currency  
 Terms Type [ ] Currency type [ ]  
 Terms Net Days [ ] Currency unit [ ]  
 Terms Description [ ]

DATES  
 Date of Supply [ ]  
 Payment Date 2014-08-27

NOTES/MESSAGES

Attachment  
 Filename [ ] Add Attachment

DETAIL SECTION

Line number	Qty	UOM	Unit Price(Excl. VAT)	VAT %	Line Total(Excl. VAT)	Line Total	Actions
1	0	[ ]	0 €	0 %	0 €	0 €	[ ]

ITEM DESCRIPTION  
 [ ]

NOTES/MESSAGES  
 [ ]

Cancel Validate Save to Drafts Save to Templates Send Recalculate

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The Invoice Creation Form contains three different kinds of fields:

- Mandatory fields that are marked with orange text boxes
- Optional fields that are marked with white text boxes

- Prefilled fields that are marked with gray text boxes. Prefilled fields contain information provided by user during registering or with receiver's predefined information

You need to complete all mandatory fields. Once you have entered all information, you can validate the information you entered by clicking the **Validate** button either on the top or bottom of the form. You can also calculate amounts for invoice total sum, VAT amounts and line sums by clicking the **Recalculate** button either on top or bottom of the form.

Once you have entered and validated the information, send the invoice by clicking the **Send** button either on the top or bottom of the form.

Once the invoice is sent, a visualization of invoice data is shown. This visualization, however, is not the actual invoice copy that user should archive. A copy of invoice for the archival purposes is sent to portal after the invoice has been processed on Liaison Integration Platform.

## eInvoice Drafts

If you are creating an invoice and don't want to send it yet, you can save the invoice as a draft by clicking the **Save to Drafts** button on the top or bottom of the Invoice Creation Form. Drafts are then saved to the **Drafts** list as seen in the screenshot below.

Act	Processed Date	Invoice Number	Type	Sender	Receiver	Info
	14.4.2014 15:14:16	Testlasku123	INVOIC	Test Supplier B	Test Buyer A	Copy
	27.5.2013 16:20:00	moi	INVOIC	Test Supplier B	Test Buyer A	Invalid

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## eInvoice Templates

If you often send invoices with similar content to the same customer, you can use templates to decrease the work required to send an invoice. Templates are prefilled invoice creation forms, so you can commonly used information in the invoice creation form and then save it as a template. Then this template can be used as a basis for a new invoice.

Save a template by clicking the **Save to Templates** button. Saved templates can be seen in the **Templates** list as seen in the screenshot below.

Liaison eInvoicing | eInvoices | Customer connectivity | Test User | Settings | Logout

**LIAISON**

eInvoices  
 Send eInvoice  
 Sent 24  
 Drafts 2  
**Templates 2**  
 Rejected 0

Document templates are used to pre fill documents.  
 To create new Template, just create new eInvoice and save it as Template.

Delete Template

	Name	Partner	Last Modified At	Created By	Delete Template
<input type="checkbox"/>	Template - 27.5.2013 16:21:23	Test Buyer A	27.5.2013 16:21:23	Test User	
<input type="checkbox"/>	Template - 20.8.2013 11:34:06	Test Buyer A	20.8.2013 11:34:06	Test User	

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## Rejected eInvoices

If an electronic invoice is rejected for any reason, the rejection is shown in the **Rejected** list and in the **Sent** list. These views are shown in the screenshots below.

Liaison eInvoicing | eInvoices | Buyer connectivity | Settings | Administration | Logout

**LIAISON**

eInvoices  
 Send eInvoice  
**Sent 155**  
 Drafts 88  
 Templates 59  
 Rejected 14

Search

Show PDF

Select: All, None < Latest < Newer 126 - 150 of 155 Older > Oldest >

Act	Processed Date	Invoice Number	Type	Sender	Receiver	Download PDF	Show PDF	Info
<input type="checkbox"/>	28.5.2013 12:48:54	qwer1	INVOIC	eInvoicingTestCompany	eInvoicingTestPartner			
<input type="checkbox"/>	28.5.2013 11:50:40	qwer1	INVOIC	eInvoicingTestCompany	eInvoicingTestPartner			
<input type="checkbox"/>	28.5.2013 11:49:46	qwer1	INVOIC	eInvoicingTestCompany	eInvoicingTestPartner			Rejected for Business reason
<input type="checkbox"/>	22.5.2013 9:25:49	qwer1	INVOIC	eInvoicingTestCompany	eInvoicingTestPartner			Rejected for Business reason
<input type="checkbox"/>	22.5.2013 9:22:23	qwer1	INVOIC	eInvoicingTestCompany	eInvoicingTestPartner			
<input type="checkbox"/>	22.5.2013 9:11:43	qwer1	INVOIC	eInvoicingTestCompany	eInvoicingTestPartner			
<input type="checkbox"/>	22.5.2013 9:03:51	qwer1	INVOIC	eInvoicingTestCompany	eInvoicingTestPartner			Rejected for Technical reason
<input type="checkbox"/>	22.5.2013 9:01:30	qwer1	INVOIC	eInvoicingTestCompany	eInvoicingTestPartner			Rejected for Technical reason
<input type="checkbox"/>	22.5.2013 8:56:15	qwer1	INVOIC	eInvoicingTestCompany	eInvoicingTestPartner			Rejected for Technical reason
<input type="checkbox"/>	8.5.2013 13:17:57	123123	INVOIC	CatSup	eInvoicingTestPartner			
<input type="checkbox"/>	20.3.2013 15:02:41	asd	ORDERS	Testing	eInvoicingTestPartner			Rejected for Technical reason
<input type="checkbox"/>	18.3.2013 16:49:21	wert	INVOIC	Testing	eInvoicingTestPartner			Rejected for Technical reason <span>Copy</span>

Liaison eInvoicing | eInvoices | Buyer connectivity | Roope Thomsson | Settings | Administration | Logout

**LIAISON**

eInvoices

- Send eInvoice
- Sent 155
- Drafts 88
- Templates 59
- Rejected 14**

Act	Processed Date	Invoice Number	Type	Sender	Receiver	Info
	28.5.2013 14:22:11	qwer1	INVOIC	eInvoicingTestCompany	eInvoicingTestPartner	Rejected for Technical reason
	28.5.2013 13:25:51	qwer1	INVOIC	eInvoicingTestCompany	eInvoicingTestPartner	Rejected for Technical reason
	18.3.2013 16:49:21	wert	INVOIC	Testing	eInvoicingTestPartner	Rejected for Technical reason <a href="#">Copy</a>
	18.3.2013 15:30:44	wert	INVOIC	Testing	eInvoicingTestPartner	Rejected for Technical reason <a href="#">Copy</a>
	14.3.2013 15:50:06	1243	INVOIC	Organisaato	eInvoicingTestPartner	Rejected for Technical reason
	6.3.2013 10:13:32	qwer	INVOIC	eInvoicingTestCompany	eInvoicingTestPartner	Rejected for Technical reason <a href="#">Copy</a>

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Rejections usually occur due to technical reasons and business reasons:.

- A *Technical Rejection* may occur if the message cannot be processed on Liaison Integration Platform. There can be various reasons for this but usually reasons causing technical rejections are fixed by Liaison. If a technical rejection occurs, you should just resend the invoice again at least 24 hours later.
- A *Business Rejection* may occur if the receiver of invoice (i.e., customer) did not approve the invoice sent by you. In this case you should contact the customer and ask why the customer didn't approve the invoice.

## Downloading eInvoice Copy for Archiving

After invoice has been sent and processed at Liaison Integration Platform, an archive copy of invoice is sent back to portal for you to download. Portal cannot be used as a long term archive for sent invoices; therefore you need to download the invoice archive copy into its own archive.

Archive copies can be downloaded from the **Sent** list as seen in the screenshot below.

Liaison eInvoicing | eInvoices | Customer connectivity | Test User | Settings | Logout

**LIAISON**

eInvoices

- Send eInvoice
- Sent 25**
- Drafts 2
- Templates 2
- Rejected 0

Recent Items  
 INVOIC #654646546

Show PDF

Select: All, None

Act	Processed Date	Invoice Number	Type	Sender	Receiver	Download PDF	Show PDF	Info
<input type="checkbox"/>	27.8.2014 12:35:24	654646546	INVOIC	Test Supplier B	Test Buyer A	<a href="#">Download PDF</a>	<a href="#">Show PDF</a>	<a href="#">Info</a>
<input type="checkbox"/>	12.6.2014 8:07:43	1233213	INVOIC	Test Supplier B	Test Buyer A			
<input type="checkbox"/>	27.5.2013 15:58:16	123999999999	INVOIC	Test Supplier B	Test Buyer A			

# Changing Portal Settings

From the **Liaison eInvoicing** tab you can change settings of the Portal.

## Profile

In the **Profile** section you can change your name and password. Note that changing the name does not affect your username when logging in. Screenshot of profile section is shown below.

Liaison eInvoicing | eInvoices | Customer connectivity | Test User | Settings | Logout

**LIAISON**

Settings  
**Profile**  
 Alerts  
 Themes

**Profile**

Name:

Old Password:

New Password:

Confirm New Password:

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## Alerts

In the **Alerts** section you can set up alerts to be sent to a designated email address when an event occurs. Screenshot of alerts section is shown below.

Liaison eInvoicing | eInvoices | Customer connectivity | Test User | Settings | Logout

**LIAISON**

Settings  
 Profile  
**Alerts**  
 Themes

**Create new Alert**

Name:

Description:

Condition: Visualization Received ▼

Frequency: Daily ▼

**Current Alerts:**

Name	Description	Condition	Frequency	Trading Partners
No alerts set				

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Configurable events are:

- Visualization received
- Rejection received

You can also set up frequency of alert messages. This means that alerts are sent only once within the selected time period. Options for frequency are:

- Daily
- Twice daily
- Three times a day
- Hourly
- Every 15 minutes

## Themes

In the **Themes** section you can change the color theme of the portal. Screenshot of themes section is shown below.



The screenshot displays the Liaison eInvoicing portal interface. At the top, there are navigation tabs for 'Liaison eInvoicing', 'eInvoices', and 'Customer connectivity'. The user is logged in as 'Test User' with links for 'Settings' and 'Logout'. The main content area shows the 'Settings' menu on the left, with 'Themes' selected. The 'Select theme' dropdown is open, showing a list of themes: Flick, Blitzzer, Sunny, UI lightness, Cupertino, Smoothness, WebForms grey, Frog, and Pink. The current theme is 'Flick'. At the bottom, there is a copyright notice for Liaison Technologies 2014 and contact information for technical support.

Liaison eInvoicing eInvoices Customer connectivity Test User | Settings | Logout

**LIAISON**

Settings  
Profile  
Alerts  
Themes

Select theme  
Current theme : Flick  
Flick  
Blitzzer  
Sunny  
UI lightness  
Cupertino  
Smoothness  
WebForms grey  
Frog  
Pink

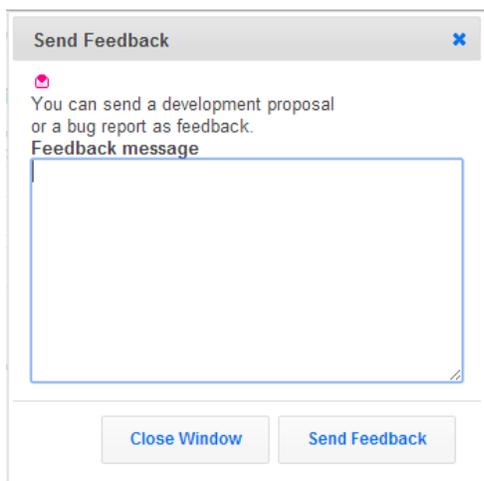
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## Other

### Sending Feedback to Liaison

In case you encounter an unwanted behavior or a functional error in the Portal, it is recommended that you notify Liaison about it. The easiest way to do so is through the feedback form. A link to the feedback form is displayed on the footer of every page.

Screenshot of feedback form is shown below.



The screenshot shows a dialog box titled "Send Feedback" with a close button (X) in the top right corner. Inside the dialog, there is a small red icon and the text: "You can send a development proposal or a bug report as feedback." Below this text is a text input field labeled "Feedback message". At the bottom of the dialog, there are two buttons: "Close Window" and "Send Feedback".

### Contacting Liaison Support

In case you want to contact Liaison Support with questions regarding the Portal, you can call Liaison Technical Support at +358 600 93388 (2,92 EUR/min + network charges).

### **Corporate Headquarters**

3157 Royal Drive · Suite 200  
Alpharetta, Georgia 30022  
+1 866.336.7378 t · 770.442.4900  
Fax: 770.442.4901  
Support: +1 866.830.3600  
[softwaresupport@liaison.com](mailto:softwaresupport@liaison.com)

### **European Headquarters**

Visiokatu 3  
33720 Tampere · Finland  
+358 (0)10. 3060. 900  
Fax: +358 (0)10.3060.901  
Support: +44 (0)808.234.9848  
[support.europe@liaison.com](mailto:support.europe@liaison.com)

