



**Invoice-Portal.de**  
POWERED BY WEBWARE INTERNET SOLUTIONS

## **Invoice-Portal.de** **Portal User Manual**

Version 1.2

Webware internet solutions GmbH  
Teichstraße 14-16  
34130 Kassel  
Germany



## Content

1.	Portal registration .....	2
2.	Clients .....	4
2.1.	Client data .....	4
2.2.	Client address .....	6
3.	Create invoice .....	7
4.	Webware Service Desk .....	11

## 1 Portal Registration

To register in the portal please use the following link: <https://app.invoice-portal.de>

The screenshot below shows how the registration page looks like and what information should be entered.

The screenshot displays a 'Sign Up' registration form with the following fields and values:

Field	Value
Company Name	Agoratech
Company Phone Number	+4915212345678
Country	Germany
Street	Seebergstr, 456
City	Kassel
ZIP	34130
Tax Nr.	DE 279247134
Title	Mr.
First Name	Max
Last Name	Mustermann
E-Mail	max.mustermann@agoratech.de
Choose Password	.....
Confirm Password	.....

**All fields are mandatory**

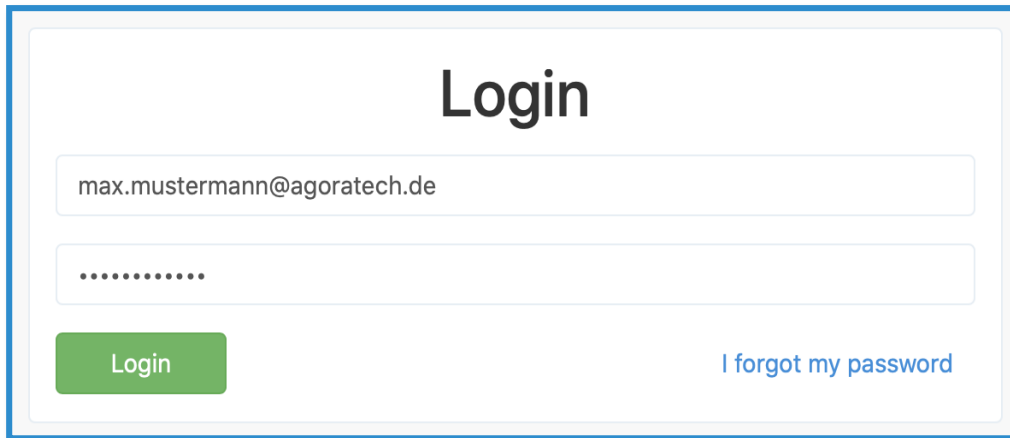
**Continue**

After you have entered all information click **[continue]** to proceed to the next step. You will receive an e-mail with a confirmation code. Please return back to the invoice portal and complete your registration by entering the confirmation code.

An e-mail will follow to inform you about the registration processing. Please allow up to 4 hours for this step to be completed a member of our team has to review and accept your registration.

Once your registration has been reviewed you will receive a confirmation email notifying you that your account has been activated.

Please return to the login page and enter your login details, as shown in the figure below.

A login form interface with a blue border. At the top, the word "Login" is centered in a large, bold, black font. Below it, there are two input fields. The first field contains the email address "max.mustermann@agoratech.de". The second field contains a series of dots, indicating a password. Below the input fields, there is a green button labeled "Login" and a blue link labeled "I forgot my password".

**Login**

max.mustermann@agoratech.de

.....

Login

[I forgot my password](#)

## 2 Clients

Before an invoice can be generated and sent using the invoice portal, the invoice recipient data has to be added to the portal. To do this please visit the menu **[clients]** and select the green button **[new]** to add a new client.



### 2.1 Client Data

When adding a new client please pay special attention to the mandatory fields. Mandatory fields are marked with a **[\*]** next to the field's name. If a mandatory field is not filled, an error message will be displayed. The user cannot continue until all mandatory fields are filled in. Please find below a brief explanation of the fields available:

**Client name\*** (*mandatory field*)

Please enter the client's company name.

**Different trade name** (*optional*)

Please enter the different name of the company.

**Reference** (*mandatory field*)

Please enter the client's internal reference number. If an invoice is sent to a public invoice recipient, please enter the route ID in this field (*example route ID: 16900664-0001-43*).

**VAT ID or tax number** (*optional*)

In accordance with § 14 UStG, an invoice must contain either the tax number issued to the company operator by the tax office or the VAT identification number issued to the company operator by the Federal Central Tax Office:

**Tax number**

The tax number in Germany consists of 13 digits (*example: 2200000100001*).

If your company only trades within Germany, indicating the tax number on the invoice is considered sufficient.

The Sales Tax Identification Number, Sales Tax ID or VAT Registration Number identifies a company within the European Union. The VAT number or Value Added Tax Identification Number is another term used to describe the tax number. It enables transactions between countries within the European Union to be processed. In Germany, the VAT ID consists of the country's prefix DE and a nine-digit numerical code (*example: DE279247134*).

To validate your VAT ID please use the following link: [https://ec.europa.eu/taxation\\_customs/vies/?locale=de](https://ec.europa.eu/taxation_customs/vies/?locale=de)

**Registration code** (*optional*)

The registration code is the identification code of the buyer's electronic address identification scheme (*example: 0088 (for EAN)*).

**Registration Code and Registration Value** (*optional*)

Please fill these fields only if you are using Simple Invoice (Dutch invoice format). For further information, please visit the following website:

<https://docs.peppol.eu/poacc/billing/3.0/codelist/ICD/>

**Registration Value** *(optional)*

The registration value identifies the client's electronic address to which a business document should be delivered (*example: 987654321*).

**E-Mail Address** *(optional)*

Please fill this field to provide a default e-mail address where invoices should be delivered to. The e-mail address can be reset after sending the invoice.

**Country** *(mandatory field)*

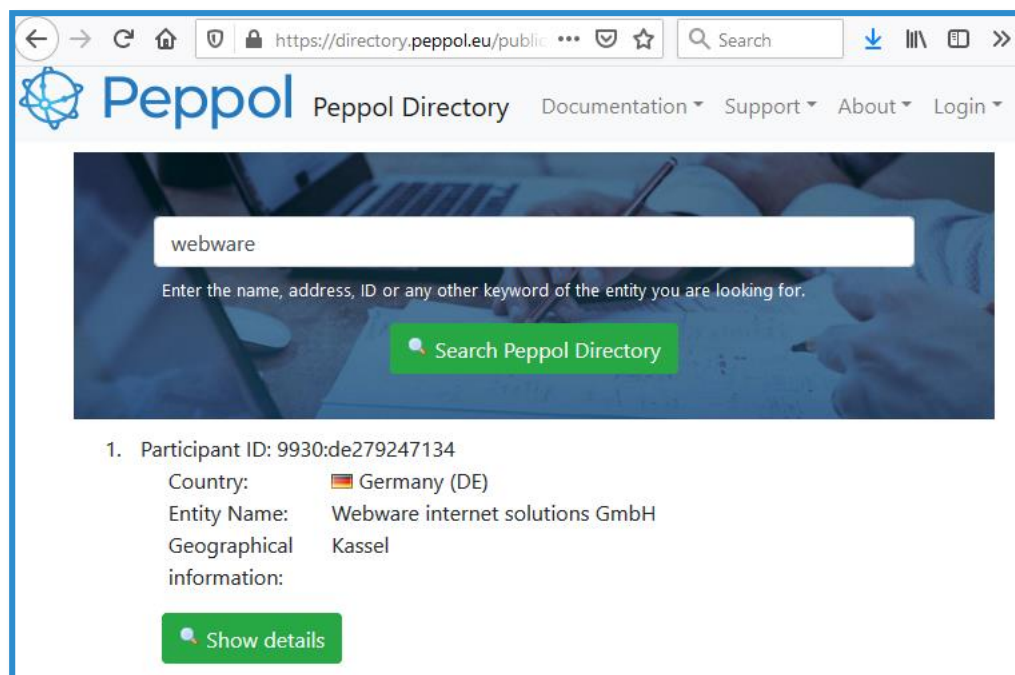
Please enter the country of your client.

**PEPPOL Code ID** *(optional)*

If the invoice is sent via the Peppol Network, the Peppol ID issuing office should be entered.

**PEPPOL Code Value** *(optional)*

If the invoice is sent via the Peppol Network, the client's Peppol ID should be entered. The Peppol ID of a client can be found by searching the Peppol Directory using the following link: <https://directory.peppol.eu/>



**Payment method** *(optional)*

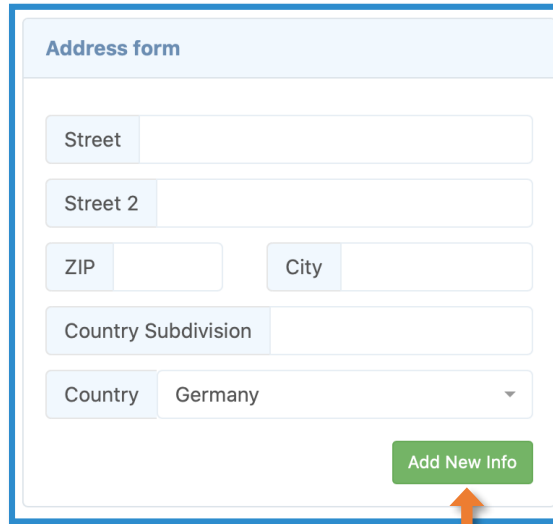
Please select a payment method from the list.

**Payment Terms** *(optional)*

Please specify payment conditions. Payment terms can also be saved in the general settings. It is possible to define different payment terms for each client. When creating an invoice, there is the option of selecting payment terms predefined in the general settings or selecting client specific payment terms.

## 2.2 Client Address

To complete the client's data entry the information on the client's address has to be stored.

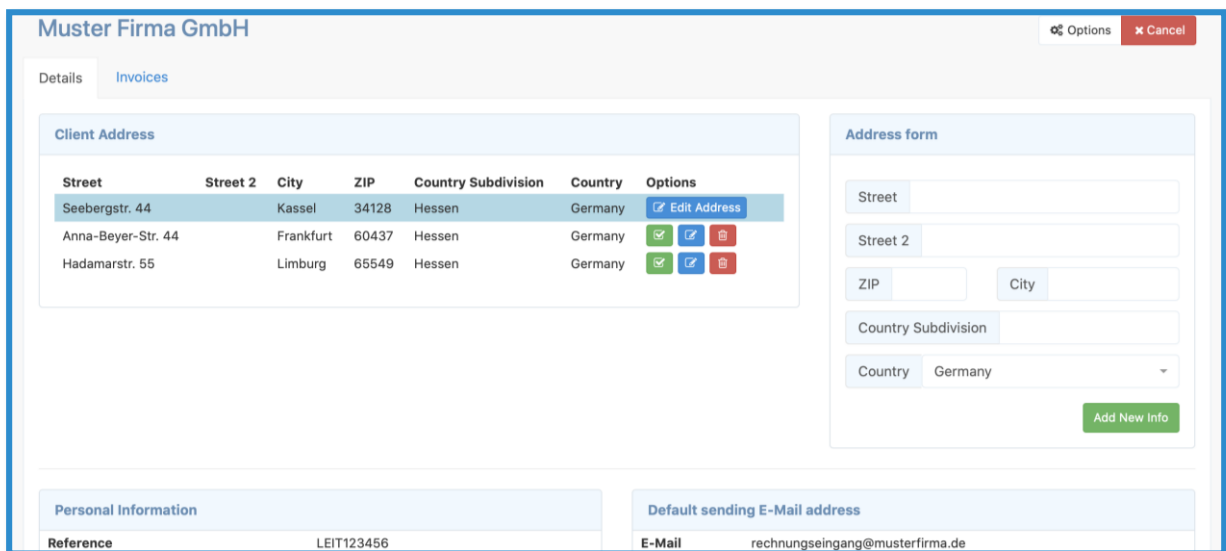


The screenshot shows a form titled "Address form" with the following fields:

- Street
- Street 2
- ZIP
- City
- Country Subdivision
- Country (dropdown menu showing "Germany")
- Add New Info** (green button)

An orange arrow points to the "Add New Info" button.

Multiple addresses can be assigned to one client. Addresses stored can be selected from a dropdown once stored in the portal before issuing an invoice. One address can be selected as the default address.



The screenshot shows the "Muster Firma GmbH" client page with tabs for "Details" and "Invoices". The "Details" tab is active, showing a "Client Address" table and an "Address form" on the right.

Street	Street 2	City	ZIP	Country Subdivision	Country	Options
Seebergstr. 44		Kassel	34128	Hessen	Germany	<a href="#">Edit Address</a>
Anna-Beyer-Str. 44		Frankfurt	60437	Hessen	Germany	<a href="#">Select</a> <a href="#">Edit</a> <a href="#">Delete</a>
Hadamarstr. 55		Limburg	65549	Hessen	Germany	<a href="#">Select</a> <a href="#">Edit</a> <a href="#">Delete</a>

The "Address form" on the right contains the same fields as the first screenshot, with the "Add New Info" button at the bottom right.

At the bottom of the page, there are two sections:

- Personal Information**: Reference LEIT123456
- Default sending E-Mail address**: E-Mail rechnungseingang@musterfirma.de

### 3 Create Invoice

To create an invoice please visit the menu **[invoices]** and then click **[new]**.



A pop-up window will open which will allow you to enter the main invoice information, as shown in the figure below.

Once an invoice has been created and completed, it can be saved as an invoice template. Payment terms can be selected from the general settings or from the client-specific payment terms. To confirm your selection, click the button **[submit]**.

After this step an invoice will open with some of the main fields prefilled based on the information in the invoice field. You can now adjust and change individual fields of the invoice.

Pos.	Name	Description	Quantity	Price	Tax Rate	
1	Interactive Online Course	Project Management	3 Days	550	19,00% (S)	Total: €1.963,50
2	Interactive Online Course	Scrum Project Management	1 Days	300	19,00% (S)	Total: €0,00

Subtotal	€1.650,00
Item Tax	€313,50
Apply to all	19,00% (S)
<b>Total</b>	<b>€1.963,50</b>



For the field [Delivery], please specify a billing address or simply enter a different address provided to you by the client, as shown in the figure below.

Dashboard Invoices File transfer Clients

Invoice N° 1

Draft

Muster Firma GmbH

Seebergstr. 44  
34128 Kassel  
Hessen  
Germany

Ref.: LEIT123456

Document Type\* Invoice N° 1

Invoice Date 2020-10-11 Due Date 2020-11-10

Delivery Date 2020-10-12 Inv. period from 2020-10-12 to 2020-10-14

Order Reference IOC-PM-2 Contract Reference VRT23 Project Reference

Payment Method Payment to bank account Currency EUR (€)

Payment Terms

Delivery

Receiver of Delivery

Street

Street 2

ZIP City

Country Subdivision

Country None

Once all invoice data has been entered, you can view the invoice in various formats, as shown in the figure below:

Dashboard Invoices File transfer Clients

Invoice N° 1

Sent (E-Mail)

Muster Firma GmbH

Seebergstr. 44  
34128 Kassel  
Hessen  
Germany

Ref.: LEIT123456

Document Type\* Invoice N° 1

Invoice Date 2020-10-11 Due Date 2020-11-10

Delivery Date 2020-10-12 Inv. period from 2020-10-12 to 2020-10-14

Order Reference IOC-PM-2 Contract Reference VRT23 Project Reference

Payment Method Payment to bank account Currency EUR (€)

Payment Terms

Delivery

Receiver of Delivery

Street

Street 2

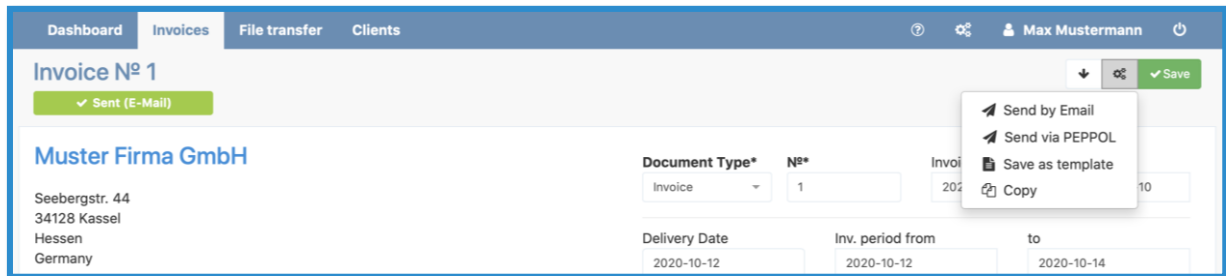
ZIP City

Country Subdivision

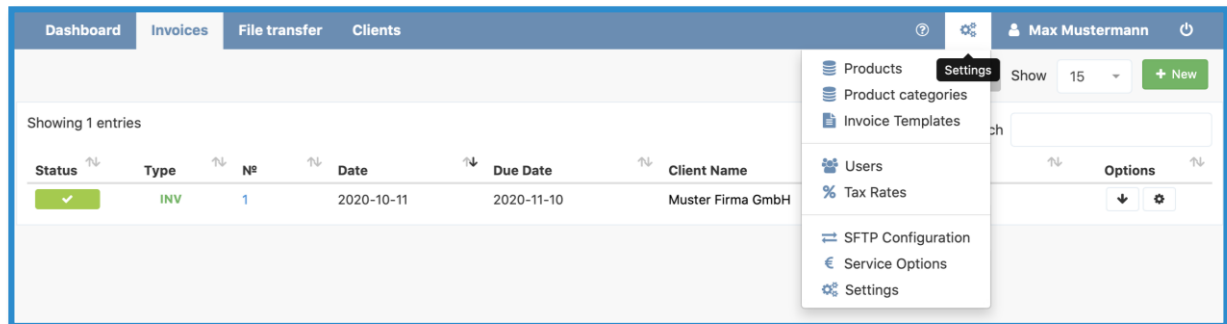
Country None

PDF  
PEPPOL BIS Billing 3.0 Invoice  
XRechnung 1.2 Invoice  
SI-UBL 2.0 Invoice

You can choose between multiple options to send your invoice to the client, such as send the email via E-mail or via Peppol. You also have the option to save the invoice as a template or create a copy to process another invoice as shown in the figure below.

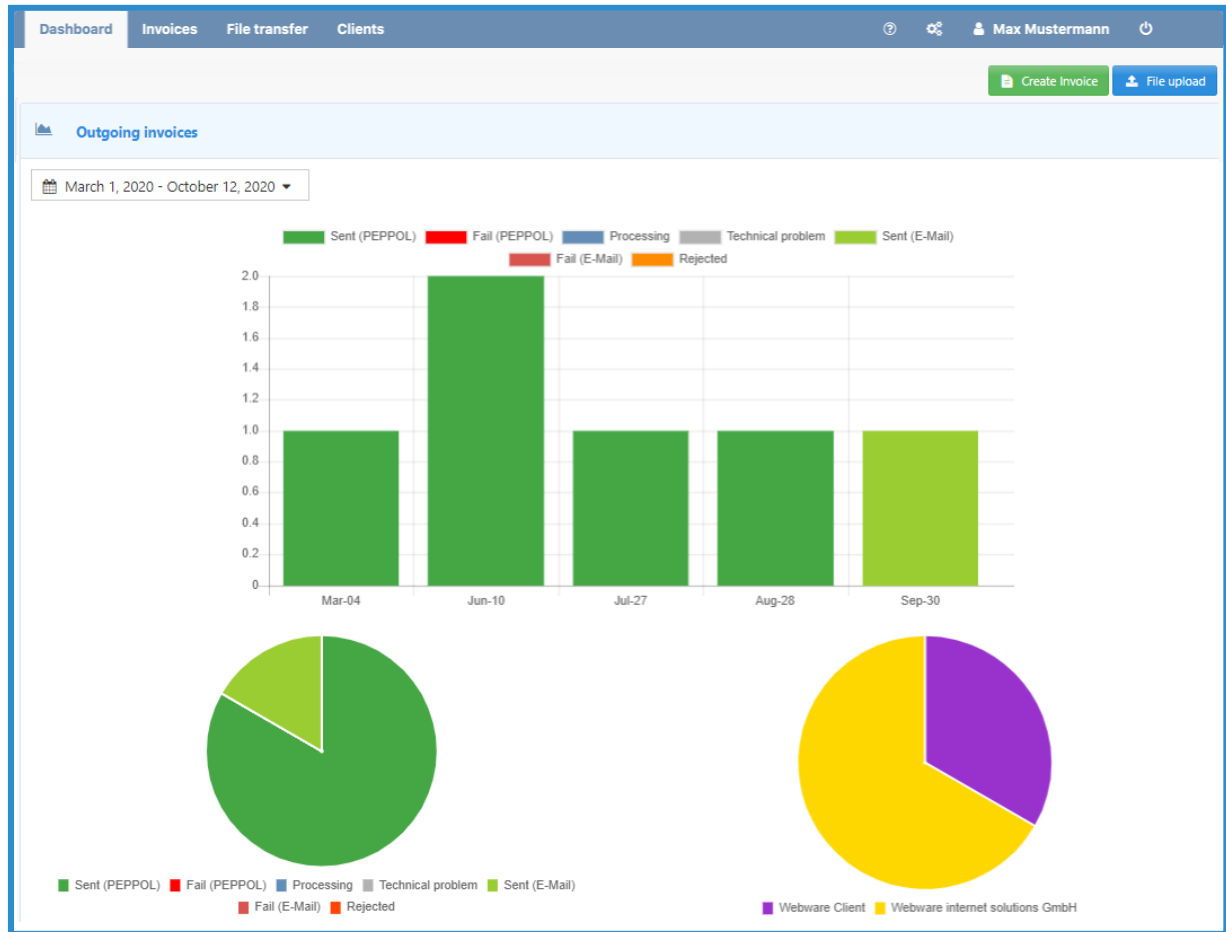


The portal has an extensive administration menu in which additional settings concerning the invoice products and other invoice characteristics can be accessed as shown in the figure below:



## 4 Dashboard and Overview

The portal has a dashboard that gives you an overview of your invoices sent and their current processing status.



Under the menu **[File Transfer]** you will find a list of your current and past invoices as well as more detailed information with regards to date, client and amount charged.

Recently created invoices								
Status	Type	Nº	Date	Due Date	Company Name	Client Name	Amount	Options
	INV	1	2020-10-06	2020-11-05	Geräte GmbH	Solutions GmbH	€21213,42	
<a href="#">View All</a>								
File transfer								
Current Status	Via	Nº	Receiver/Sender	Company Name	Format	Last change	Invoice	
	E-Mail	1	→ Muster Firma GmbH	Agoratech	PDF	2020-10-11 21:12:39		
	E-Mail	INV1235456	→ Webware internet solutions GmbH	Webware Client	XRechnung 1.2 Invoice	2020-09-30 15:03:01		
					PEPPOL BIS Billing 3.0			

## 5 Webware Service Desk

This is a brief user guide to outline the main features of the invoice-portal. Please do not hesitate to contact us if you have any further questions.

**E-mail:** [support@invoice-portal.de](mailto:support@invoice-portal.de)