INEXCHANGE WEB

CREATE INVOICE

MENU

Get started

Introduction to InExchange Web

Our web-based services are recommended for users who do not use an ERP system for creating their invoices. If you have an ERP system, InExchange Invoice Printer is a fitting solution. It allows you to continue to create your invoices as usual, and to then print them to the virtual invoice printer. Read more about the invoice printer here.

Through our web-based services, **InExchange Web Base** and **Web Plus**, you can easily send e-invoices to your customers simply by logging in to InExchange Network. In this guide, we explain how you get started with the service, create invoices, connect your customers to the recipients in the network, and find your sent invoices.

When you use InExchange Web Plus, you also get access to our new service - **InExchange Reminder and Debt Collection.** This service helps with the processing of reminders and debt collections and even notifies you when it is time to send them. (The service is currently only available in Sweden.)

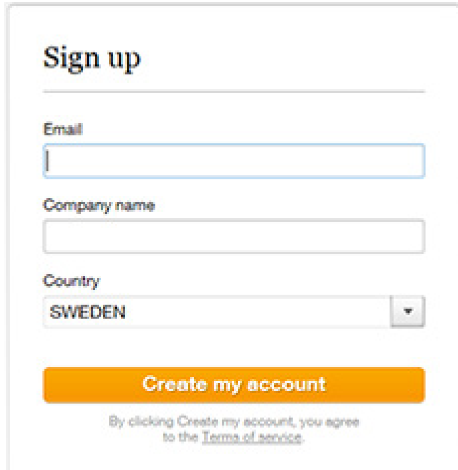
Create account

You can sign up for **InExchange** and create an account on our website www.inexchange.com.

1. Click on “Sign up” A.

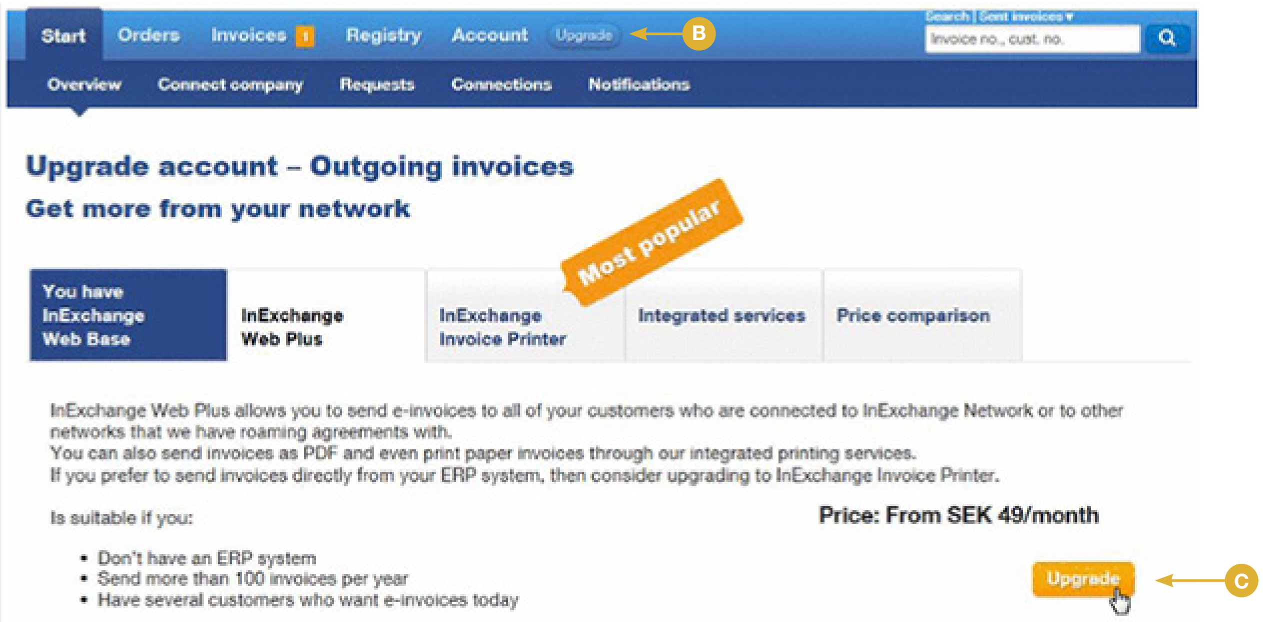
2. Fill in your information.

3. Click on “**Create my acocunt**”.



You have now created a free **InExchange Web Base** account, which means that you can send up to 100 e-invoices/PDF invoices per year free of charge.

If you want to get access to our service **InExchange Reminder & Debt Collection** (available in Sweden) as well as be able to send paper invoices, upgrade your account to **InExchange Web Plus**. You can do this through your login to **InExchange Network**. Click on “**Upgrade**” B and choose InExchange Web Plus (or other service of your choosing) and click on “**Upgrade**” C as shown below.



Find your way around

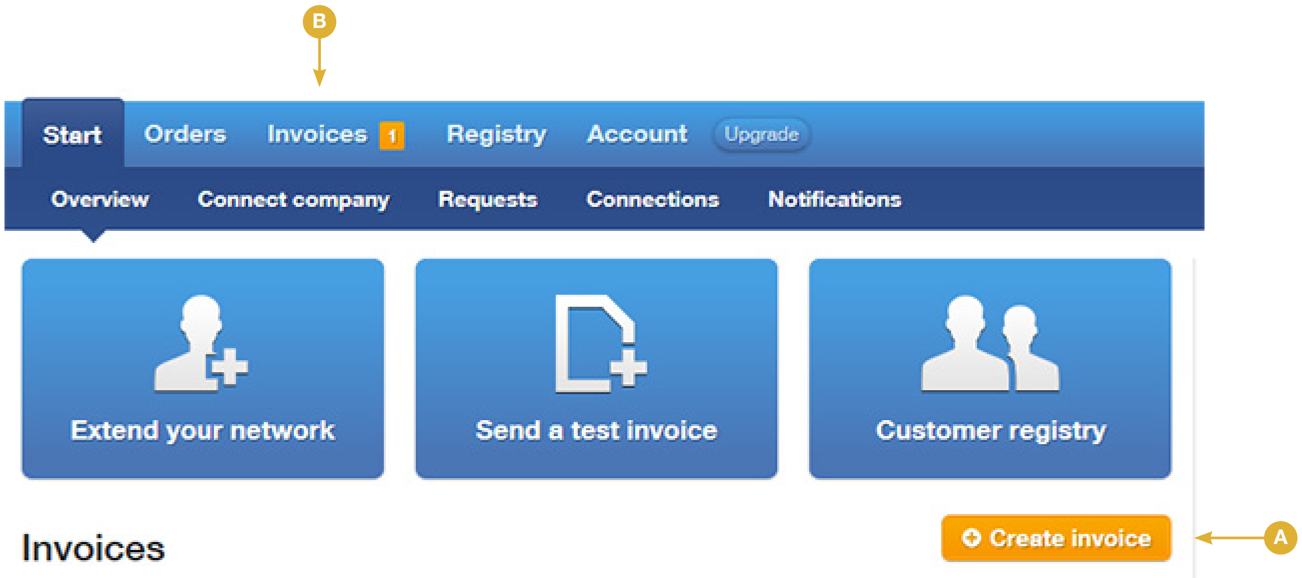
If you are still not logged in to **InExchange Network**, you can log in now with your username and password.

Choose one of the following in order to create an invoice:

1. Click on "**Create invoice**" on the start page. A.

2. Click on "**Invoices**" B and then on "**Create invoice**" in the menu.

Regardless of which you choose, you will find yourself on the page "**Create invoice**".

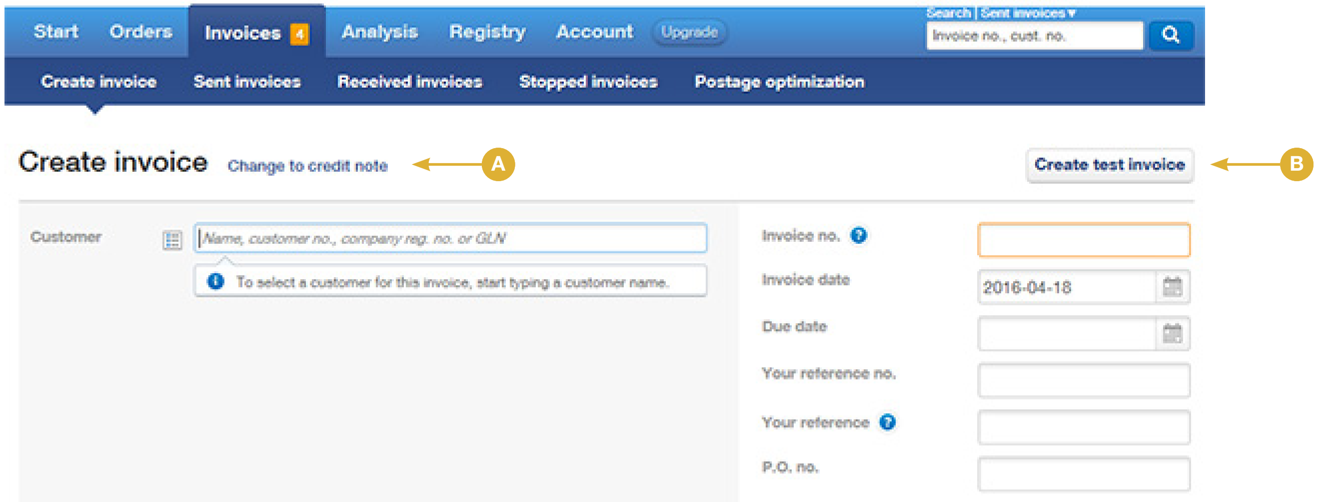


Send your invoices

Create invoice

Now you can create your first invoice. You can also choose a credit invoice A.

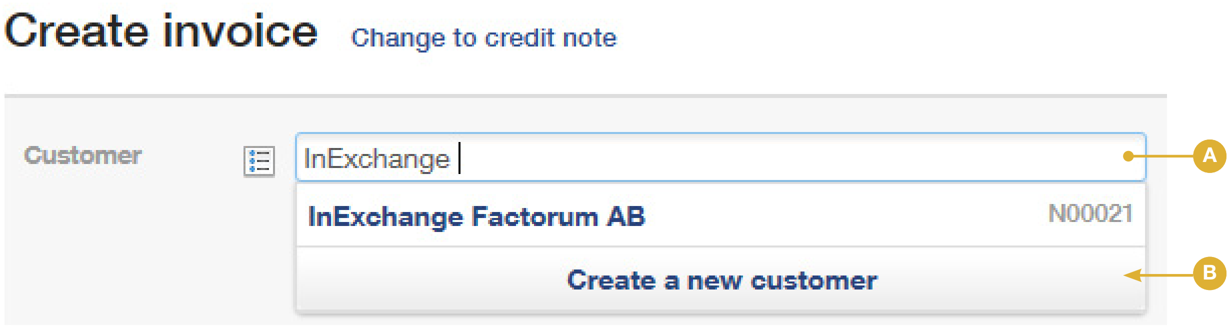
[See our video about Creating an invoice >>>](#)



Please note! A tip is to start by creating a test invoice by clicking on the button "Create test invoice" B. Test invoices are not saved and are only sent to your e-mail address. This allows you to easily experiment with the service and review the final result before getting started.

Choose a customer

Start by typing in the customer's name (alternatively a customer number, company ID number or GLN) in the search field "**Customer**" A. As you begin typing you will receive suggestions of companies that are already part of **InExchange Network** or are in your customer registry.



Choose an existing customer or create a new one by choosing "**Create a new customer**" B. If you choose to create a new customer, you will immediately find a customer card that will ask you to input the following: customer number, delivery method, terms and addresses, etc. Click on "**Save**" to save the customer to your customer registry.

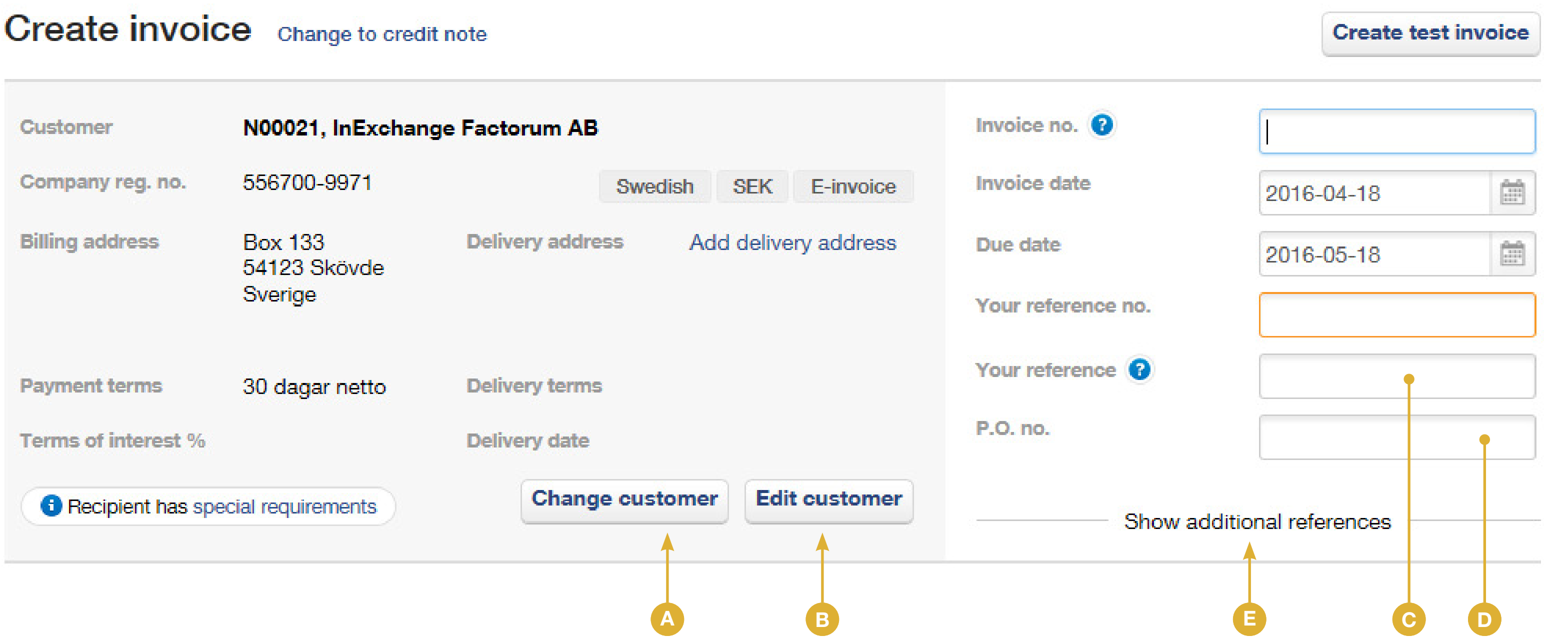
Invoice header

Now fill out the invoice date, expiration date and other necessary information in the invoice header.

You can also, if needed, change the customer by clicking on “**Change customer**” A, or change the information in the customer card by clicking on “**Edit customer**”. B.

You can choose to use a manual number series or an automatic one. You can make settings for this in **InExchange Network** > “**Account**” > “**Profile**” > “**Number sequences**”.

If you want to include a specific contact person for the invoice, type that in the field “**Your reference**” C. If you have received a specific order number from the customer, you can type that into “**P.O. no**” D. You can read more about references here.



Click on “Show additional references” for additional reference fields E.

Invoice rows

Invoices need to include at least one complete invoice row with a description, quantity and price per unit in order to be sent. Fill out the necessary information in the invoice rows. Please note that the "**Description**" field can be used for free text on the invoice rows.

• Choose an existing VAT rate or create your own by clicking on the arrow in the VAT column.

• You can add rows, remove rows, and sort them by using the buttons and icons on the side. If you hold your mouse over an icon you will be shown a description of its function.

• The invoice's total is summed and any discounts, additional charges or other items are specified below the invoice rows.

This is an example of how your invoice may look:

Item	Description	Quantity	Unit	Unit price	Discount %	VAT	Amount excl. VAT
001	Blankets	10	Pcs	50.00	10.00	25%	450.00
020	Sandwiches	10	Pcs	20.00		12%	200.00
030	Magazines	10	Pcs	10.00		6%	100.00

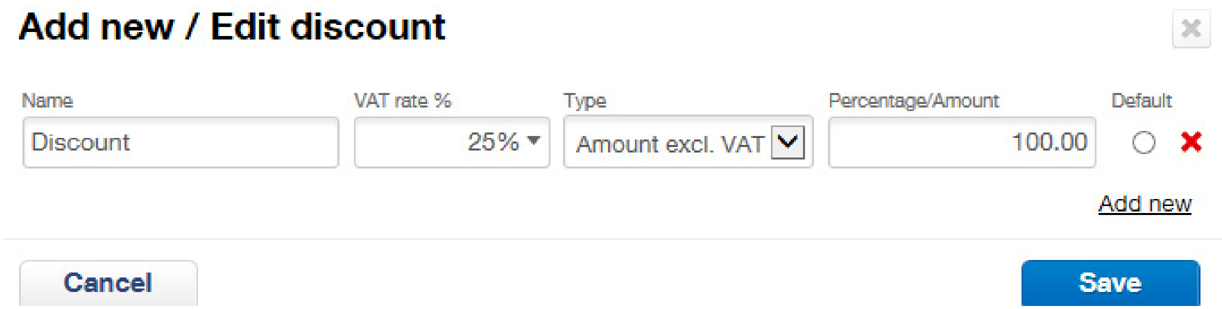
Add new line

Add discount Add charge

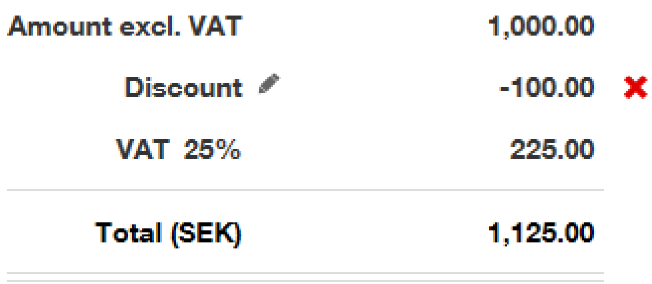
Amount excl. VAT	**750.00**
VAT 6%	**6.00**
VAT 12%	**24.00**
VAT 25%	**112.50**
Rounding	**0.50**
Total (SEK)	**893.00**

Additional charges and discounts

Click on “**Add charge**” or “**Add discount**” to add a charge or discount to the entire invoice (discount for a specific invoice row should be added on that row). Add a name for the charge/discount, VAT charge and price without VAT or a percentage value. Then click on “**Save**”.



The information is added to the total with the noted VAT charge. To remove a row from the invoice’s summation, click on the red x (which appears when the mouse hovers over the row) to the right of the row as shown in the picture below.



Invoice notes and attachments

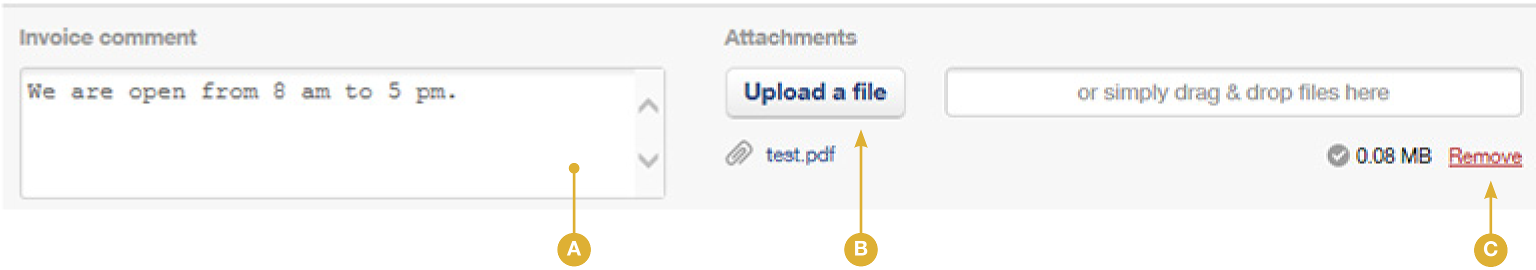
Invoice notes

In order to add additional information, regarding the purchase or other information, use the field "**Invoice comment**" A at the bottom of the page.

Attachments

In order to add attachments to the invoice, click on "**Upload a file**" B to the right of the invoice note field and search for the file which you wish to attach. Alternatively, you can drag and drop the files in the field to the right of the button. To remove an attachment, click on "**Remove**" C to the right of the file name.

You can attach picture files as well as PDF/text documents up to 2MB per attachment.



Preview and save invoice

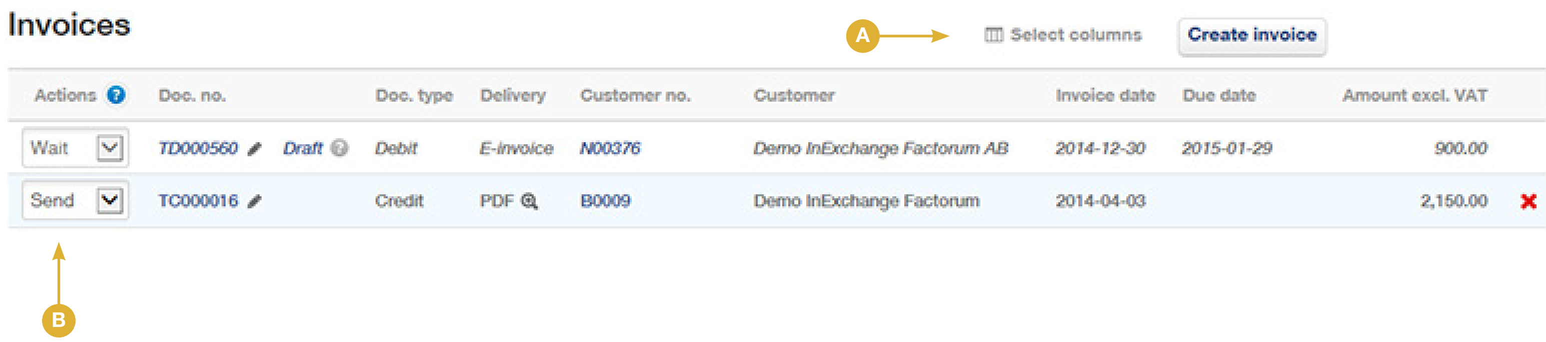
With the buttons at the bottom of the page, you can easily choose how to proceed with your invoice.

- **Remove invoice** - The current invoice will not be saved.
- **Preview** - A preview of the invoice will be shown. When you preview the invoice you will also be notified if crucial information is missing or incorrect. You will also receive information in order to correct the error.
- **New invoice** - The current invoice is saved for sending at a later time. The invoice template is cleared and you can register a new invoice.
- **Save draft** - The current draft is saved and you can continue working on it at a later time.

When you are done with the invoice registration click on "**Continue**" A. If necessary information is missing or incorrect, you will be shown information to help you correct the error.

Send invoice

When you have clicked on “**Continue**” for an invoice, you will see a list of invoices that have not been sent. If you want to see more information in this view, you can add columns by clicking on “**Select columns**” A.



If you need to edit any of the invoices, click on the pen or on the document number on the row that includes the invoice. If you want to remove an invoice, click on the red x to the right that illuminates when you hold your mouse over that invoice row.

Then choose “**Send**” on the invoices that you want to send and “**Wait**” on the invoices that you want to wait to send in the actions column B.

Click on “**Process invoices**” when the invoices are ready to be sent. The invoices are sent and the screen will display a list of sent invoices as well as delivery status.

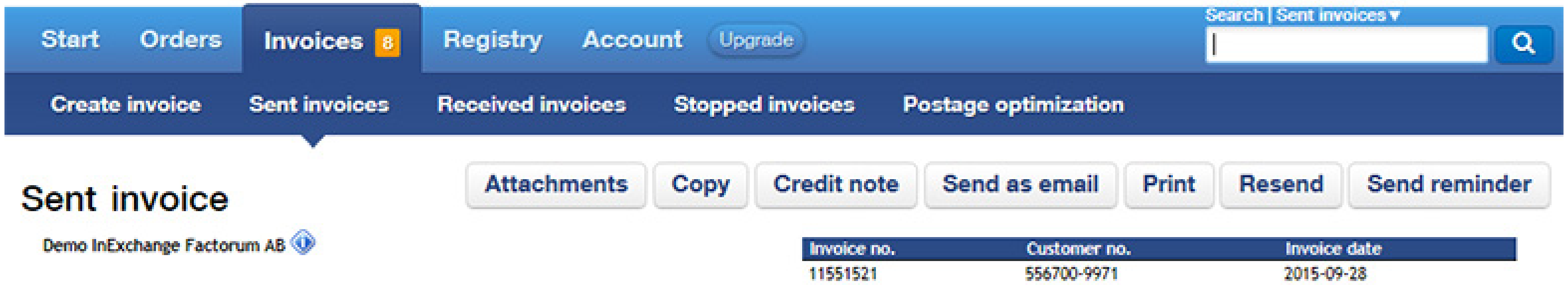
*If this is the first time you are sending an invoice, the system will ask you to fill out certain company information in your account that needs to be included on the invoice. You can also add this information before you send your first invoice by clicking on “**Account**” > “**Profile**”.*

Read more

When the invoice has been sent

When the invoice has been sent, you will find it under “**Invoices**” > “**Sent invoices**”.

If you click on an invoice on this page you will open an already sent invoice. On the invoice you will find many practical functions.



- **Attachments** - See which attachments were sent with the invoice.
- **Copy** - Create an invoice copy based on the current invoice.
- **Credit note** - Create a credit note based on the current invoice.
- **Send as email** - Send the invoice again via e-mail.
- **Print** - Print the current (sent) invoice.
- **Resend** - Send the invoice again.
- **Send reminder** - Send a reminder for an expired invoice.

Please note! You may not see all of the listed functions when you log in to InExchange Network. Variations in functions depend on which service you have chosen.

Reminder & Debt Collection - New service

InExchange Reminder & Debt Collection Plus

Users of **InExchange Web Plus** also have access to our new service **InExchange Reminders & Debt Collection Plus** in InExchange Network. The service helps you to get paid faster for your invoices and helps to create a simple and effective processing of any reminders or debt collection cases that you may have.

The service is provided in cooperation with Visma Collectors. You only pay for postage - no yearly fees or start-up costs apply.

Contact us for more information.

The service is currently only available in Sweden.

My account

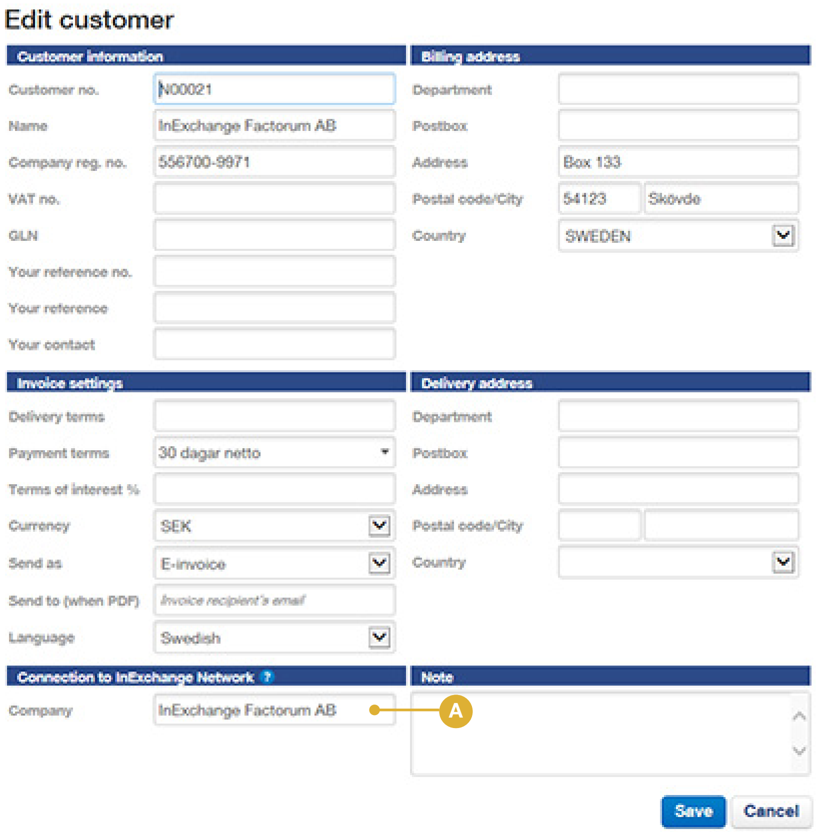
Through the links below you will find more information about your account:

- Can I send paper invoices with InExchange?
- How many user accounts are included in my contract?
- Why can´t I send invoices to some recipients?
- Can you import my customer registry?
- How do I cancel my contract?
- I´ve sent 100 invoices, what do I do now? (Web Base)

Connect a customer to a recipient in the network

InExchange Network is a network with recipients and senders of mainly e-invoices, but even e-order, etc. Connections have been constructed so that all pertinent information is available when a customer requires a correct invoice reference (for our customers). They have even been made so that our customers can reach recipients with other operators, as well as these senders being able to reach you.

When you send e-invoices to your customers, many of the recipients are already a part of the network. All you need to do is to connect to the correct recipient through the customer card by logging in to InExchange Network. You can access the customer card via "**Create invoice**" > "**Create a new customer**"/"**Edit customer**", or through "**Registry**" in the menu. Fill in the current company ID number or company name in the highlighted field as shown in the photo below to connect to a recipient in our network.



If you need to send e-invoices to a recipient that you do not find registered in our network, please contact us so that we can add that recipient. You will be able to send your invoices to that customer in no time.

Do you need help?

Please use the question mark icons for detailed information regarding specific functions.

If you need more help just click on the Help tab to the right on the screen. On our help pages you can ask questions, send us your feedback and read more about our services as well as what is going on at InExchange.

Thank you for using InExchange!