Dashboard

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Getting Started

This training guide is designed for vendors who are already integrated with the Pak Exchange Network and are ready to begin using the Pak Exchange Dashboard. Whether you're new to the platform or looking for a refresher, this guide will help you navigate the Dashboard's features and understand how to maximize its capabilities.

In the following sections, we will walk you through the key components of the Dashboard—also referred to as the Home Screen—including the tools, insights, and actions available to you as a vendor. Our goal is to ensure you feel confident and equipped to manage your interactions within the Pak Exchange environment.

NOTE: This training material is intended specifically for vendors working with PakEnergy clients. If you are a PakEnergy client, please refer to the Customer Success Portal for tailored training resources and instructional videos.

Dashboard

The Dashboard—also known as the Home Screen—is your central hub for managing activity and monitoring invoice status. Upon logging in, you'll be greeted with a series of interactive graphs and menu options designed to give you a high-level view of your invoicing activity and easy access to your information, like W9s, Insurance Certificates, ACH details, and much more. You will notice that the Dashboard is divided into three different sections.

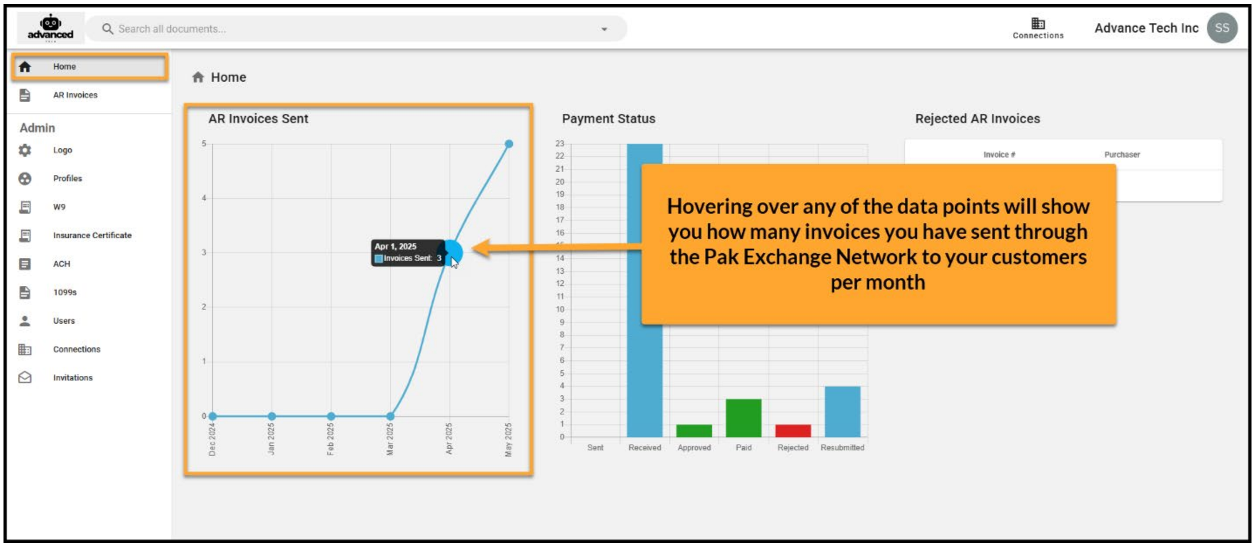
1	Header	The top of the screen provides access to global tools like search and user settings. The Header remains visible across all screens for consistent, easy access.
2	Side Bar Navigation	Located on the left-hand side of the screen, this menu allows you to move between different modules and workflows within the Pak Exchange platform.
3	Workspace	The largest section of the screen displays the selected module's data and tools. This is where most of your interaction and work will take place.

Understanding the Dashboard Graphs

The Dashboard includes three interactive graphs that provide a real-time overview of your invoicing activity. These visual tools are designed to help you quickly assess the status of your transactions and take action where needed.

AR Invoices Sent

The AR Invoices Sent graph shows the number of invoices sent per month to all connected parties on the Pak Exchange Network. It offers a high-level view of your invoicing volume over time, helping you track trends and activity levels.



Payment Status

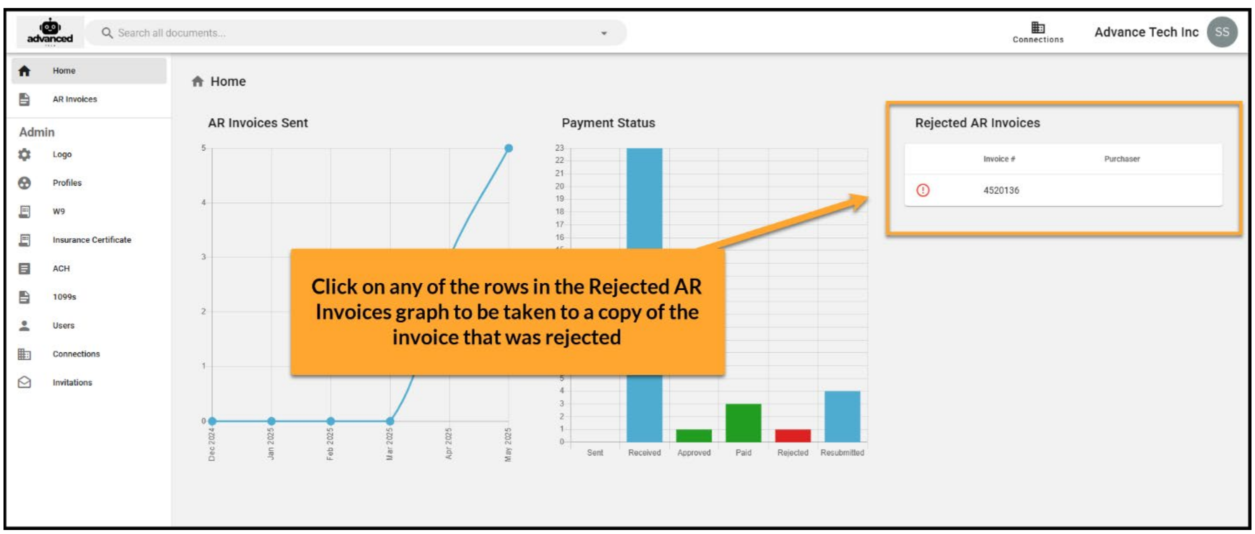
The Payment Status graph provides a snapshot of where your invoices are in the processing lifecycle with your customers. It is fully interactive; clicking on any status bar will take you directly to the corresponding list of invoices in the AR Invoices tab, or you can hover over any of the bars to see how many invoices are in that current status.

Please see the table below for what each status means. **REMEMBER:** Click any bar in the graph to jump directly to the AR Invoice tab for more information on the invoices themselves.

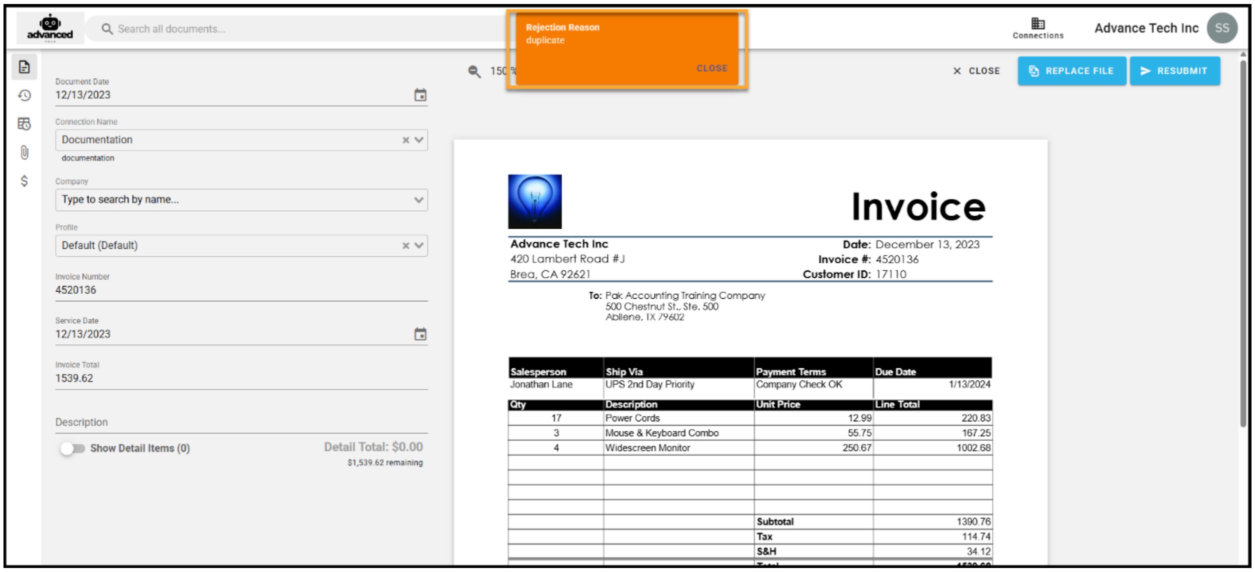
Sent	Invoices are currently being sent to your customers.
Received	Invoices that have been sent to your customers have been received by them.
Approved	Invoices have been approved for payment by your customers.
Paid	Your customers have paid the invoices, and you now have payment information, such as the check number and other payment details, available.
Rejected	Invoices returned to you by your customer and will require you to resubmit the invoice for payment.
Resubmitted	Invoices that have been corrected and resubmitted to your customers.

Rejected AR Invoices

The third and final graph is the Rejected Invoices graph. This graph highlights any rejected invoices by invoice number and customer, displayed in red for visibility.



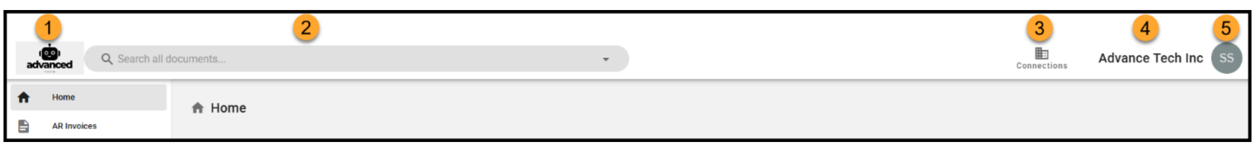
Like the Payment Status graph, this one is also interactive; clicking on a rejected invoice opens a detailed view showing a copy of the invoice and the reason for the rejection provided by your customer. **NOTE:** For more detailed guidance on handling rejected invoices, refer to the Customer Success Portal.



Now that you're familiar with the initial layout of the Dashboard, let's explore the three main interface sections in more detail: the Header, Side Bar Navigation, and Workspace.

Header

The Header is always visible and provides quick access to essential tools and account settings.



1	Company Logo	This is your company logo. For more information on how to add a Company Logo, please view [How to Add a Company Logo on the Customer Success Portal.]()
2	Search Bar	Use this tool to locate invoices quickly. The Search Bar supports keyword-based searches and can find any part of any uploaded invoice, making it a powerful tool for navigating large volumes of data.
3	Connections Icon	Displays your current Pak Exchange Network Connections. This connection icon is the same as the Connections tab on the Side Bar Navigation.

4	Company Name	This is your company name.
5	User Settings	Clicking this icon opens a dropdown menu with the following options: • Change Account: This option is available only if you are associated with more than one company on the Pak Exchange Network. • Notifications: Displays document status updates. If email notifications are enabled, you will also receive these updates via email. • Edit my Profile: Allows you to update your name, title, date format, and email notification preferences. • Logout: Logs you out of Pak Exchange. **NOTE: Logout is recommended for those using a shared computer to ensure account security.**

Side Bar Navigation

The Side Bar Navigation is located on the left-hand side of the screen and serves as the primary menu for accessing all major features and workflows within Pak Exchange. Let's discuss the different options.

Home

The Home tab—also referred to as the Dashboard—is your starting point when logging into Pak Exchange. If you navigate away to another section, clicking Home will return you to this screen. From the Home screen, you can view interactive graphs that provide a real-time overview of your invoicing activity.

AR Invoices

The AR Invoices tab is where you'll manage all invoice-related activity within the Pak Exchange Network. This section provides tools to view, filter, submit, and track invoices throughout their lifecycle. For more information on the AR Invoices tab and submitting invoices, please view our training guide on Submitting an Invoice on the Customer Success Portal.

Logo

The Logo tab, located under the Admin section of the Side Bar Navigation, allows you to upload and manage your company's logo. This logo will appear in the upper-left corner of your Pak Exchange interface and helps personalize your account. For more information on how to add a Company Logo please view How to Add a Company Logo on the Customer Success Portal.

Profiles

The Profiles tab allows you to define and manage different divisions or branches within your company. These profiles are for internal use only and are not visible to your customers. Setting up multiple profiles can help you organize invoice submissions by location, department, or business unit.

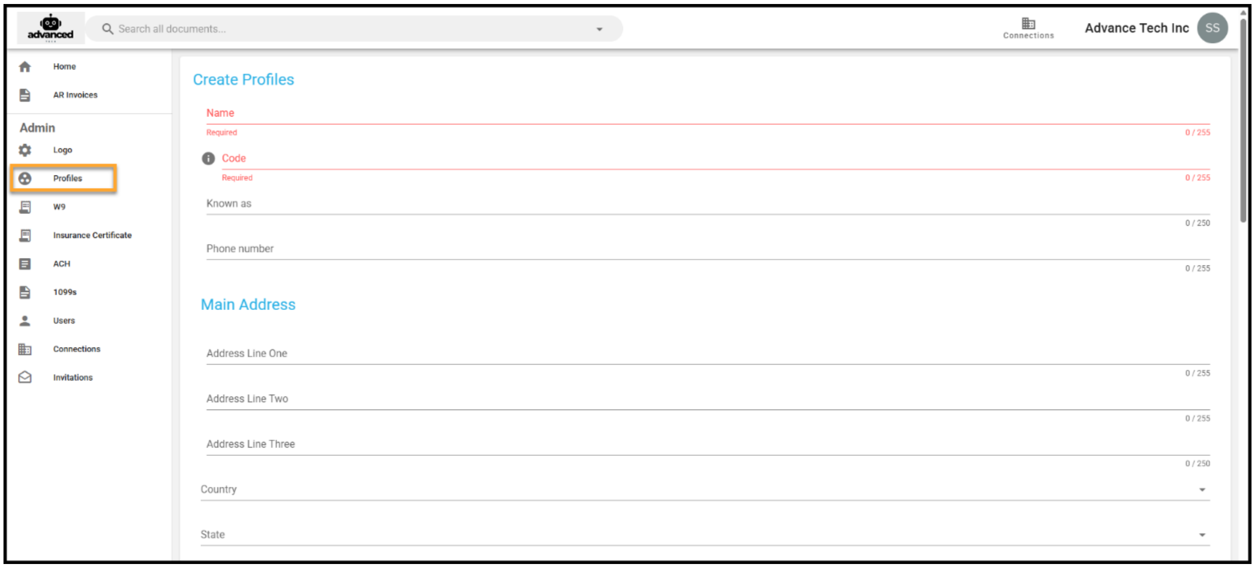
Why User Profiles?

- Helps distinguish between different parts of your organization (e.g., satellite offices, regional branches).
- Allows you to assign invoices to specific internal units for better tracking and reporting.
- Useful for companies with multiple operational entities under one Pak Exchange account.

How to Create a New Profile

To create a new Profile, navigate to the right-hand side of your screen and click on the blue + New Profile button.

A new screen will appear with many options to fill in. While the only required fields are Name and Code, let's discuss all of the fields.



Account Details	
Name	Please ensure that this field is the Name as it relates to the IRS-issued Tax Identification Number (TIN). • For a business: the Legal Name will be the Legal Business Name associated with the Employer Identification Number (EIN) assigned by the IRS on Form SS-4. • As an Individual, the Legal Name will be the full name of the person associated with the Social Security Number (SSN) assigned by the IRS on your personal Social Security Card. This step is important because the Name and Tax ID are just a couple of factors Pak Exchange uses to differentiate between connections. Please ensure this information is correct (as recorded with the IRS) and consistent with what is provided to the inviting connection.
Code	It is used to quickly separate and identify your profile. This can be anything that is used internally within your company to identify this division, or as simple as the word, "Default."
Known As	If your company or you, as an individual, go by a different name than what is associated with your EIN or SSN, you can list it in this section. This field is not required.

Main Address	
Address Line One	The first line of your personal or company's mailing address.
Address Line Two	The second line of your personal or company's mailing address. If a second line is not required in your mailing address, this field can be omitted.
Address Line Three	The third line of your personal or company's mailing address. If a third line is not required in your mailing address, this field can be omitted.
Select a Country	Using the drop-down arrow, please select the Country in which you or your company does business. This will be the same Country as your mailing address.
Select a State	Using the drop-down arrow, please select the State in which you or your company does business. This will be the same State as your mailing address.
City	Please enter the City in which you or your company does business. This will be the same City as your mailing address.
Zip Code	Please enter the Zip Code in which you or your company does business. This will be the same Zip Code as your mailing address.
Payment Address – same definitions as Main Address. Use the Payment Address fields to denote a different address where you want payments to be sent.	
Tax Address – same definitions as Main Address and Payment Address. Use the Tax Address fields to denote a different address to which your Tax ID is registered.	
Tax	
Tax Identification Type	Using the drop-down menu, please select the option for the TIN, EIN, or SSN that you will be entering for this account creation.
Tax Identification Number	Use this field to enter the 9-digit number of the TIN, EIN, or SSN.
Active Checkbox	This checkbox will make the Profile active or inactive. If unchecked, the Profile will no longer receive documentation on the Pak Exchange Network.

After all information is filled in, please click on the blue Save button in the bottom right-hand corner. This action will save the information entered and show it in the list of your company profiles.

W9

The W9 tab, located under the Admin section, allows you to upload and manage your company's IRS W9 form. Customers often require this document for tax reporting purposes and should be kept current and accurate. To add a W9 to your company in Exchange, please navigate to the left Side Bar Navigation and click on W9. From here, you will see another blue button in the top right-hand corner labeled Upload New that you will need to click next. Clicking in the gray bar under the header Upload W9 will bring up your file explorer to locate the W9 that you wish to share. Once found, click open in your file explorer.

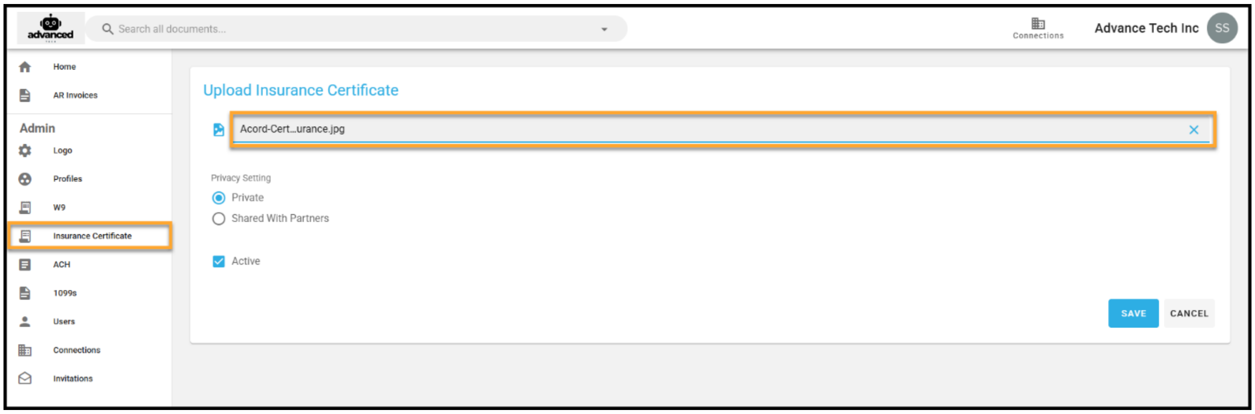
Now we can select the Privacy Settings and the Document Status. **NOTE:** You can update or replace your W9 at any time. Only one active W9 can be shared at a time.

Privacy Setting	Definition
Private	The uploaded W9 is only visible to your company.
Shared with Partners	This option allows you to share the W9 with selected connected parties. A drop-down menu will appear, allowing you to select which parties to share with.
Document Status Checkbox	**Definition**
Active	If the box is checked, the document is current and in use.
Inactive	Uncheck the box if the document is outdated or replaced.

After all settings have been entered, please click the blue Save button in the bottom right-hand corner to complete the upload and send the W9 to the selected parties if applicable.

Insurance Certificate

The Insurance Certificate tab, located under the Admin section of the Side Bar Navigation, allows you to upload and manage your company's Certificate of Insurance (COI). This document is often required by customers to verify that your business meets their insurance requirements. To upload a COI, navigate to the Insurance Certificate tab and click the Upload New button in the top-right corner. From there, click in the gray upload box, under the Upload Insurance Certificate header, to browse your file explorer for the insurance certificate that you wish to upload. Once found, click open in your file explorer.



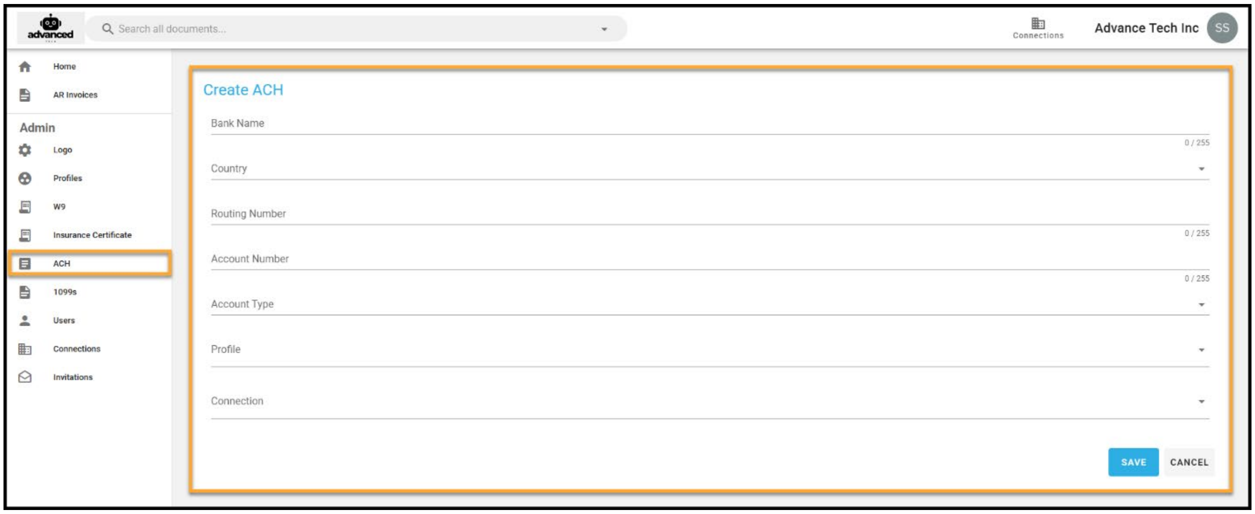
Now we can select the Privacy Settings and the Document Status. **NOTE:** You can update or replace your insurance certificate at any time. Only one active insurance certificate can be shared at a time.

Privacy Setting	**Definition**
Private	The uploaded insurance certificate is only visible to your company.
Shared with Partners	This option allows you to share the insurance certificate with selected connected parties. A drop-down menu will appear, allowing you to select which parties to share with.
Document Status Checkbox	**Definition**
Active	If the box is checked, the document is current and in use.
Inactive	Uncheck the box if the document is outdated or replaced.

After all settings have been entered, please click the blue Save button in the bottom right-hand corner to complete the upload and send the insurance certificate to the selected parties if applicable.

ACH

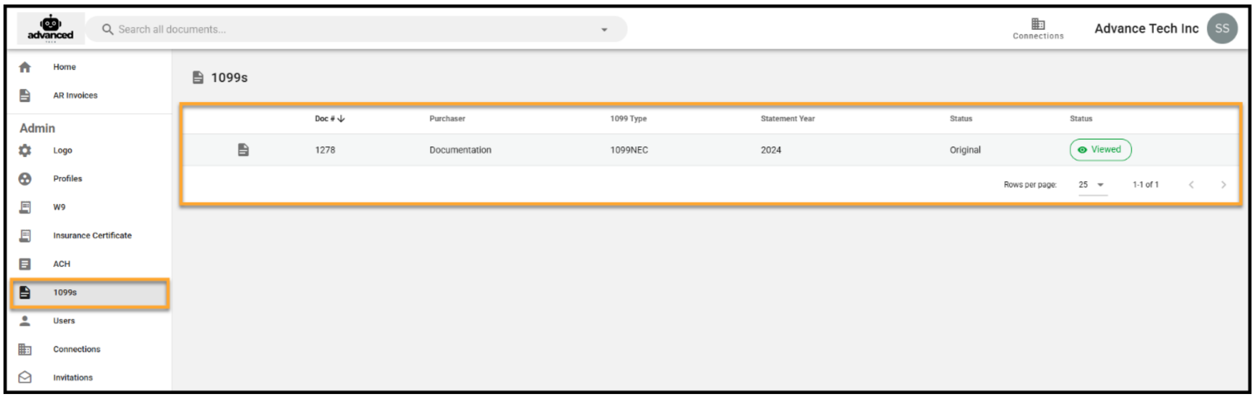
The ACH tab, located under the Admin section, allows you to provide and manage your company's Automated Clearing House (ACH) information. The information entered can be shared with connections so that customers can issue electronic payments directly to your account. To add ACH information, navigate to the ACH tab in the Side Bar Navigation and click the Create New button in the top-right corner. All of the fields on the Create ACH screen are required in order to save. Once all fields have been entered, please click the blue Save button in the bottom right hand corner. This will add the ACH information to your Exchange profile and send the ACH information to any selected connections.



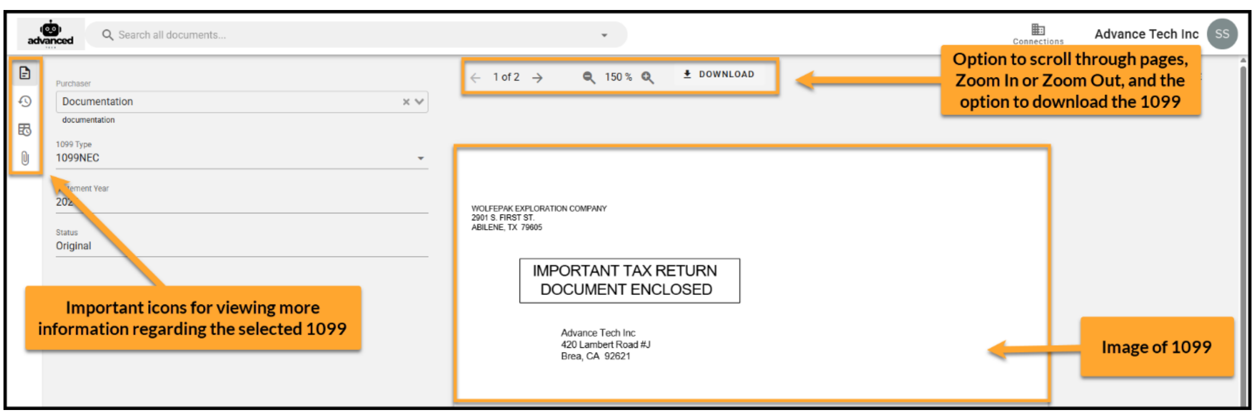
Field	Description
Bank Name	The name of the financial institution where your account is held.
Country	The country in which your bank is located.
Routing Number	A 9-digit number used in the U.S. to identify your bank for electronic transfers.
Account Number	The unique number assigned to your bank account.
Account Type	Specifies whether the account is a Checking or Savings account.
Profile	The internal company profile (formerly Org Unit) associated with this ACH setup.
Connection	The customer or party with whom this ACH information will be shared.

1099s

The 1099s tab, located in the Side Bar Navigation, allows you to view and manage 1099 tax forms that have been issued to your company by connected parties. These forms are typically generated at the end of the calendar year and are used for tax reporting purposes. When a customer issues a 1099 through Pak Exchange, it will appear in this section for your review and recordkeeping. To access your 1099s, simply click on the 1099s tab. From there, you can view a list of all 1099 forms shared with your company.



To view more details, you can click on any of the 1099s in that list. This action will bring up a full image of the 1099 form. You can download copies of the forms for your records or to share with your accounting team, and have other options to view. On the left-hand side, you will see the icons highlighted below. Let's discuss these icons in more detail.

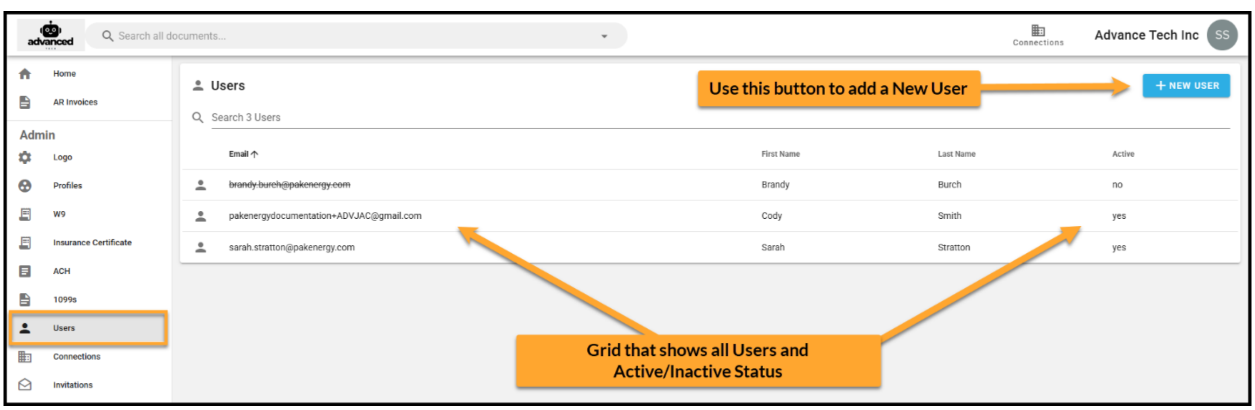


Icon	Definition
Metadata	Displays the data in the 1099 form. • Purchaser: The company that issued the 1099 to your organization. • 1099 Type: The type of 1099 form issued (e.g., 1099-MISC, 1099-NEC). • Statement Year: The tax year the 1099 form applies to. • Status: Current document status, original or modified.
Audit History	Tracks when the 1099 was originally sent to your company, along with who has viewed the 1099 and when.
Versions	Shows all versions of the 1099 uploaded.
Attachments	If there were attachments sent with the 1099 from your customer, they will appear under this icon.

If you believe a 1099 contains incorrect information, it's important to contact the issuing party directly to request a correction. **NOTE:** Pak Exchange does not generate or modify 1099s. It simply provides a secure and centralized location for receiving and storing them.

Users

The Users tab, located in the Side Bar Navigation, allows administrative users to manage who has access to your company's Pak Exchange account. From this section, you can add new users, assign roles, update user information, and remove users as needed.

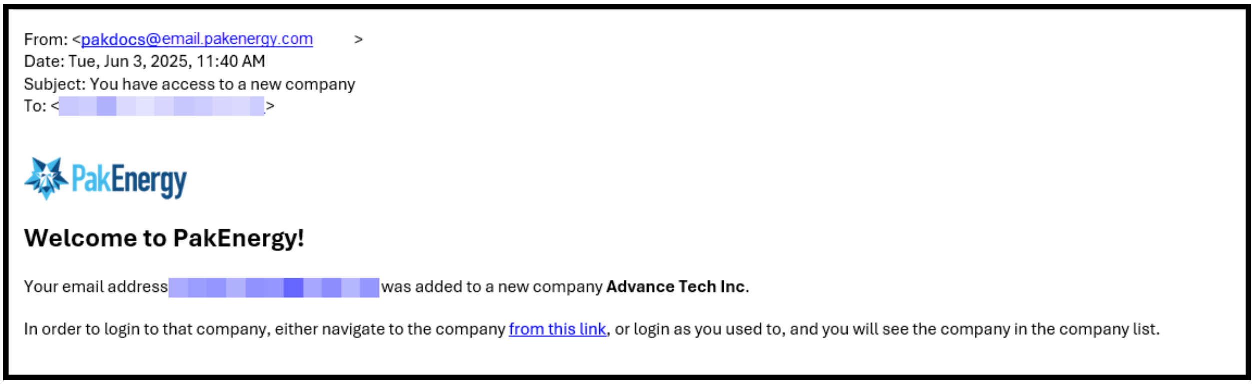


Add a New User

Navigate and click on the Users Tab in the Side Bar Navigation. Click the + New User button. This opens a form to enter the new user's details. Complete the User Information.

Field	Description
Email	The user's email address (used for login and notifications).
Title	The user's job title (optional).
First Name	The user's first name.
Last Name	The user's last name.
Phone	The user's contact phone number.
Main Role	Defines the user's access level: • User – Can perform most actions but cannot change system settings. • System Admin – Full access, including user and system management.
Profiles	The Profiles provided in the drop-down menu are those created by your Company. The admin user has the option to set up a User for as many profiles as needed. These profiles are for internal use only and are not visible to your customers.
Active Checkbox	This checkbox will make the User active or inactive. If unchecked, the User will no longer be able to submit invoices or access the Pak Exchange Network.

After Save is clicked, the User will get an Onboarding Email that looks similar to the one below. The User will need to click on the link provided to either log in with their credentials or to create a new login with the Pak Exchange Network. **NOTE:** The User will only be able to see the Profile data to which they are assigned too. This is notated as the “Bill To” on the submitted invoice.



From: <pakdocs@email.pakenergy.com >
Date: Tue, Jun 3, 2025, 11:40 AM
Subject: You have access to a new company
To: < >

Welcome to PakEnergy!

Your email address was added to a new company **Advance Tech Inc.**

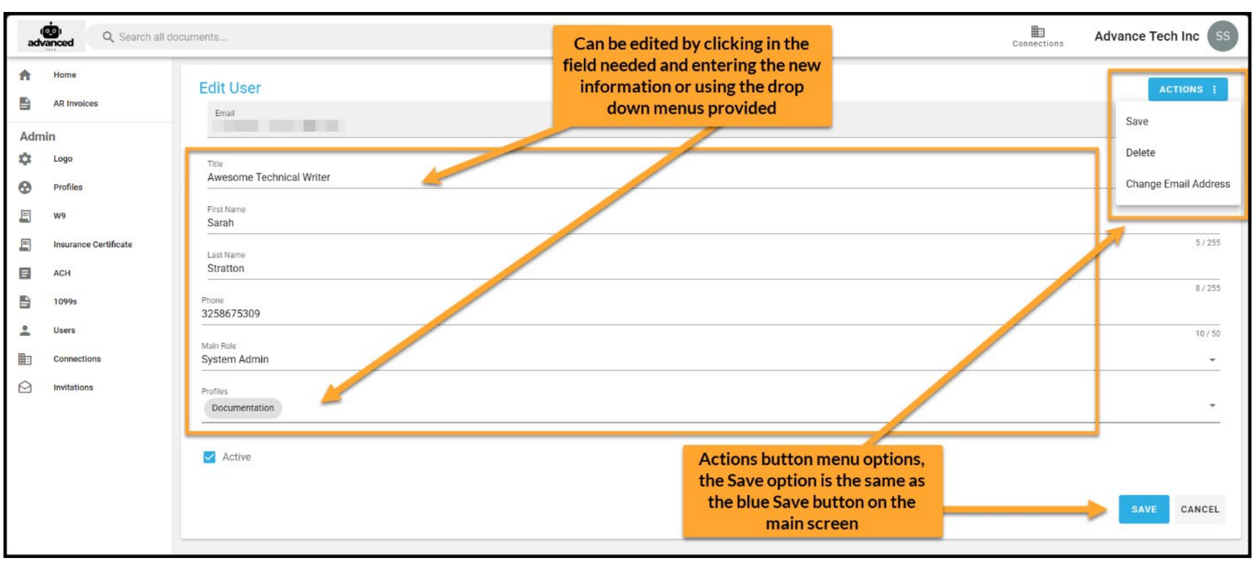
In order to login to that company, either navigate to the company from this link, or login as you used to, and you will see the company in the company list.

Managing Existing Users

From the Users screen, a System Admin can view and manage all current users associated with the company’s Pak Exchange account. For each user, you can edit details such as First Name, Last Name, Title, Main Role, and Phone Numbers. System Admins also have the ability to deactivate users and adjust the Profiles (formerly Org Units) they have access to.

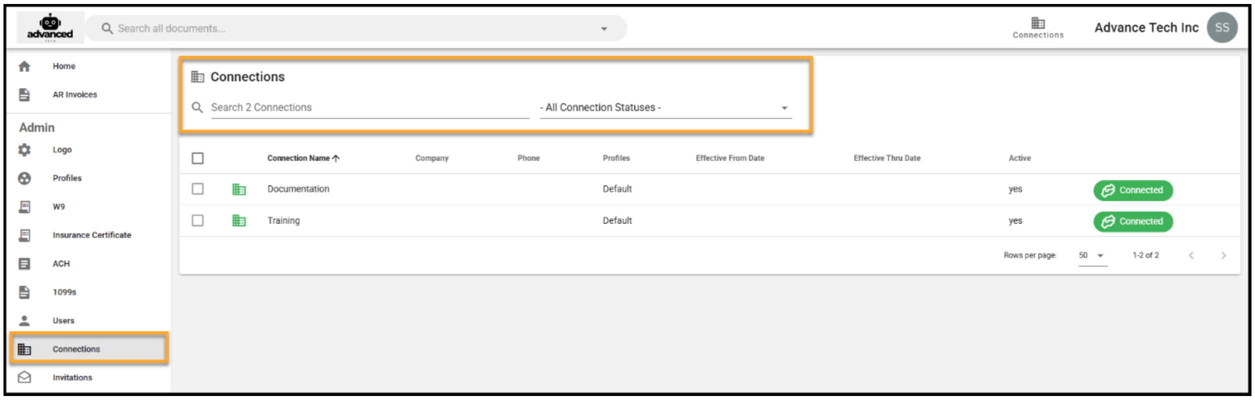
To manage an existing user, simply click on the user’s name from the list. All editable fields—like name and title—can be updated by clicking into the field and typing the new information or selecting from available dropdown menus. If you need to change the user’s email address or delete the user, click the blue Action button in the top-right corner of the screen. This will open a menu with options to Change Email Address or Delete the user.

NOTE: The Save button in the Action menu performs the same function as the Save button on the main screen—either can be used to apply your changes.



Connections

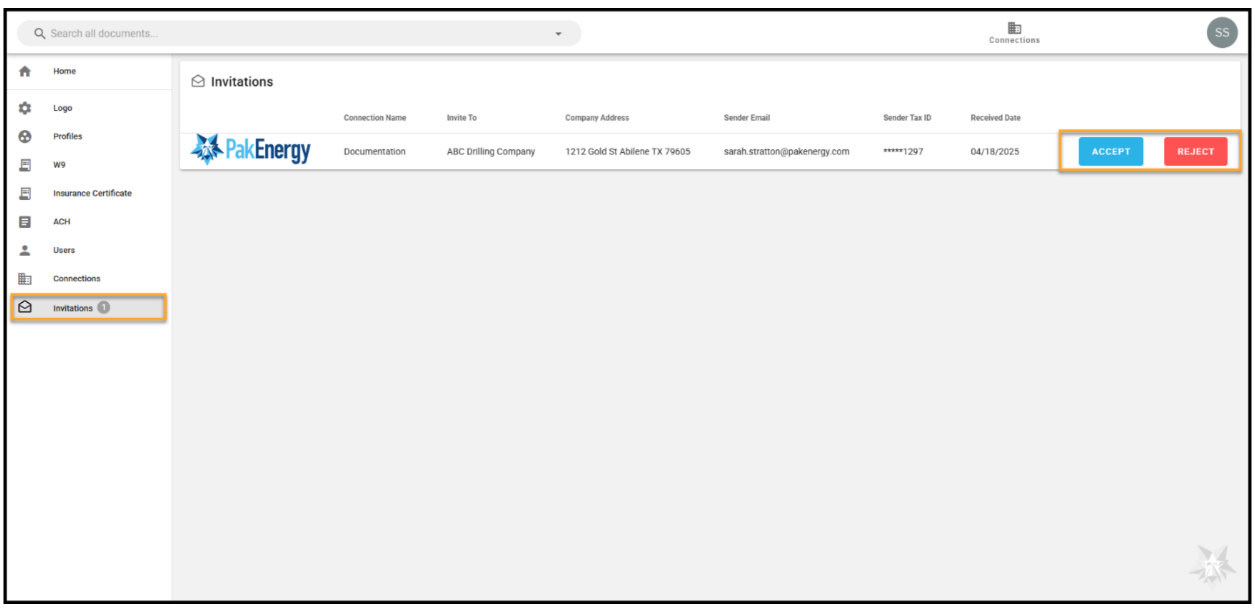
The next option on the Side Bar Navigation menu is Connections. This option shows all customers that are connected to you within Pak Exchange. To ensure a successful connection to any of your customers, a green Connected box will appear next to the specific company/username. The top of the Connections tab provides you an option to search for Connections by Name or Connection Status.



Invitations

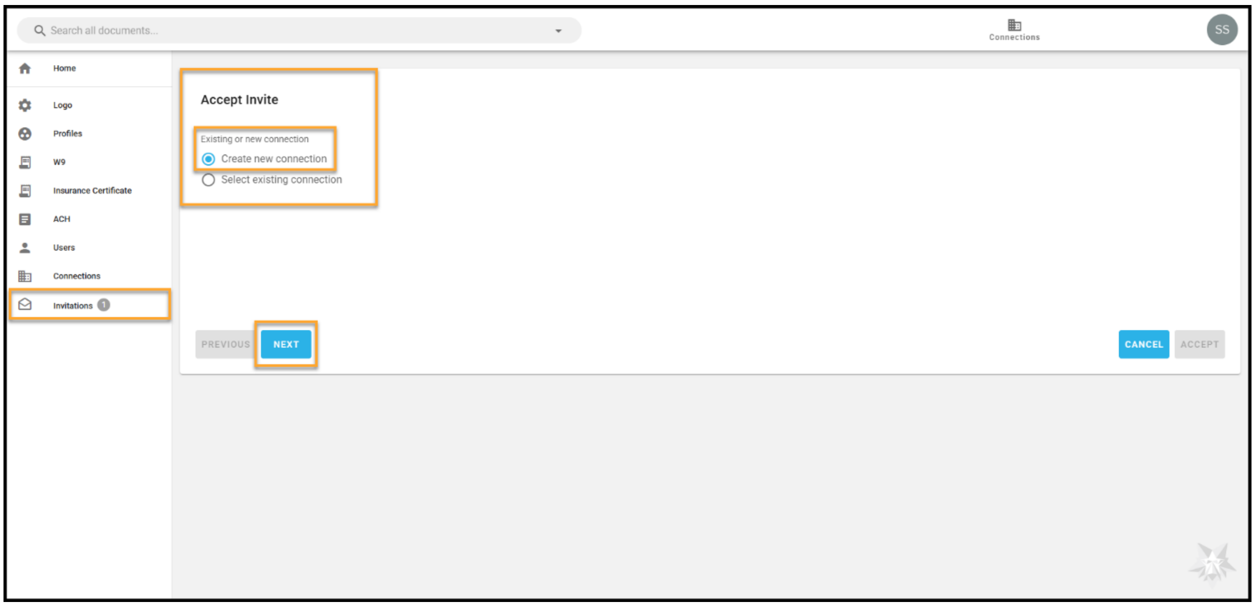
The final option is Invitations. Here, you can find any open invitation requests or respond to invitation requests.

After clicking Invitations, find the invitation you wish to accept. If you have been following this training from the beginning, the customer who sent you an invitation to connect with Pak Exchange will automatically appear.



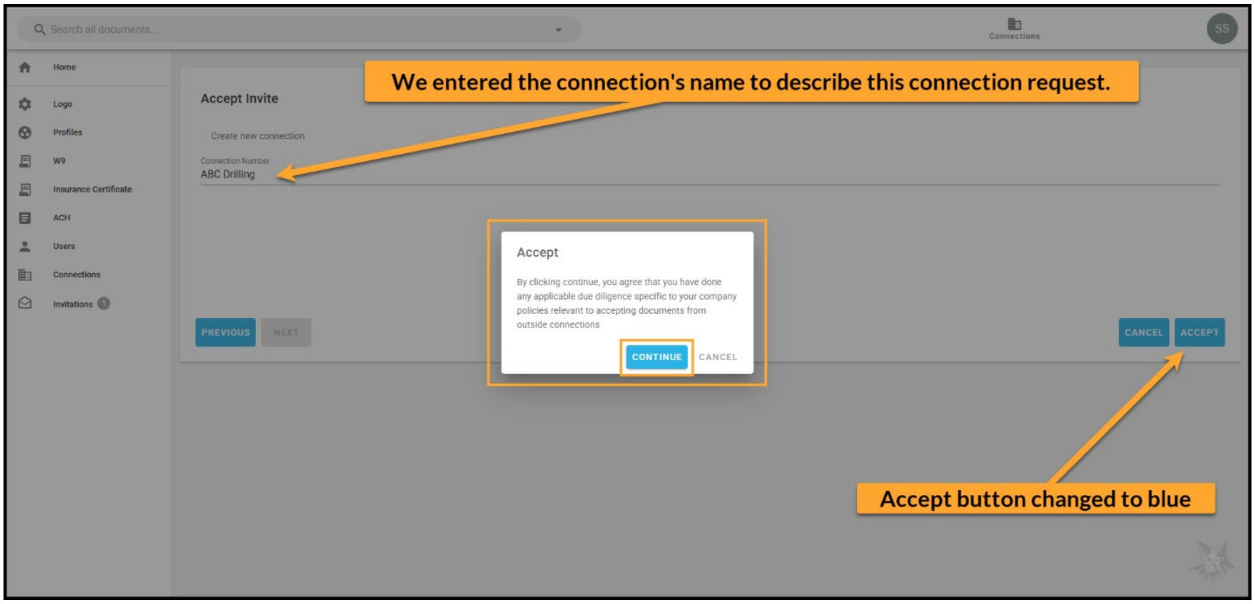
From this screen, you can choose to Accept or Reject the invitation. **NOTE:** Rejecting an invitation from one of your customers means that you will not be able to receive 1099s or submit invoices to the Connection that sent you the invitation.

We will continue assuming that you want to accept the connection request. Clicking Accept will bring up a different screen that provides the option to Create a new connection or Select existing connection. For first time setup, you will not have any other connections to connect to. If you have questions about the Select existing connection option, please get in touch with our Customer Success Team. To continue, you will hit the Next button in blue.

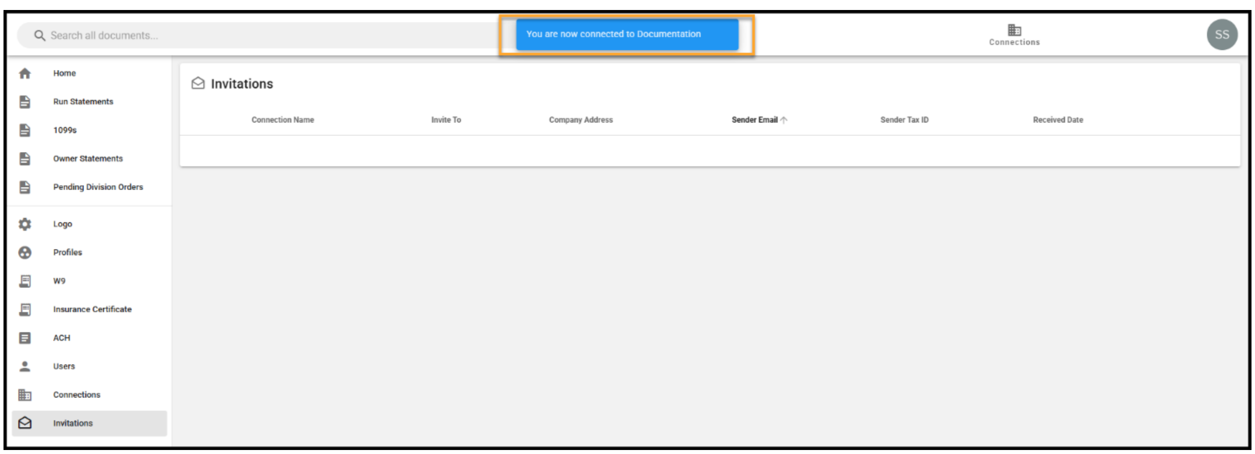


The Create new connection option allows you to enter a name or number to identify the connection. If your company doesn't have a specific naming convention, you can also enter a description of the connection or use the connection's name as is.

Once the name of the connection has been entered, you will notice that the Accept button on the right-hand side of the screen has changed from gray to blue. This means that all information required for this connection has been entered, and you are ready to continue.



Click Accept, and a pop-up box will appear confirming that you have entered all information correctly and have done any applicable due diligence specific to your company policies relevant to accepting documents from outside connections. If true, please click on the Continue button in blue to complete the connection. Once completed, you will be directed back to the Invitations screen, and a blue message will appear at the top of your screen letting you know that you have been successfully connected. You will also be able to see the new Connection under the Connections tab.



Wrapping Up

After reviewing this guide, you should feel confident navigating the Dashboard in Pak Exchange. If you require additional help, please visit the Customer Success Portal. Thank you for being a part of the Pak Exchange Network!