Submitting an Invoice

Modified on Wed, 4 Jun at 10:55 AM

Welcome to the Pak Exchange invoice submission training. This guide is intended for vendors who are already connected to the Pak Exchange Network and are ready to begin submitting invoices to clients using PakEnergy. It is designed to walk you through the invoice submission process with clarity and confidence. NOTE: This training document is specifically for vendors of PakEnergy clients. If you are a PakEnergy client, please refer to our other training materials and instructional videos available in the Customer Success Portal.

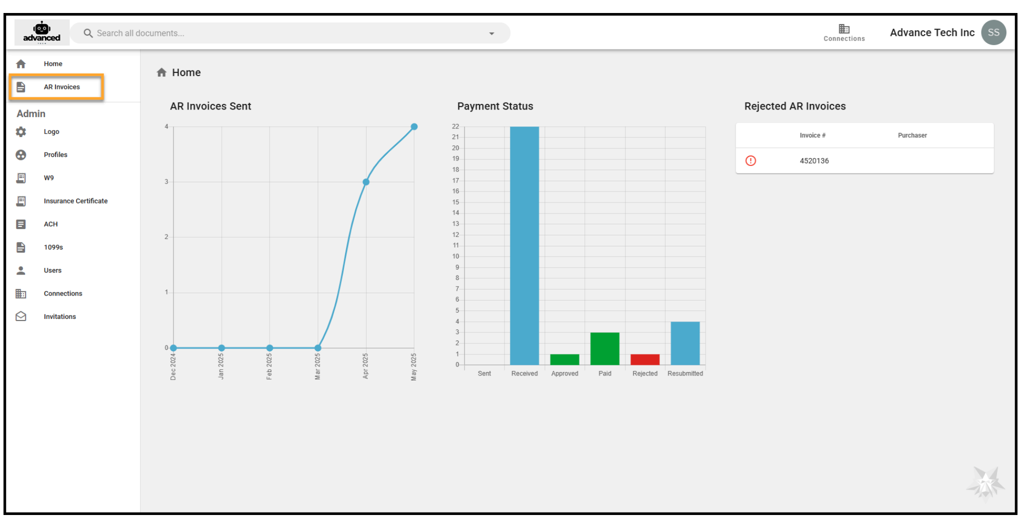
If you are a vendor of a PakEnergy client, please reach out to your customer for specifics regarding how they require invoices to be submitted through the Pak Exchange Network.

TABLE OF CONTENTS

- AR Invoice Tab
- Submitting an Invoice

AR Invoice Tab

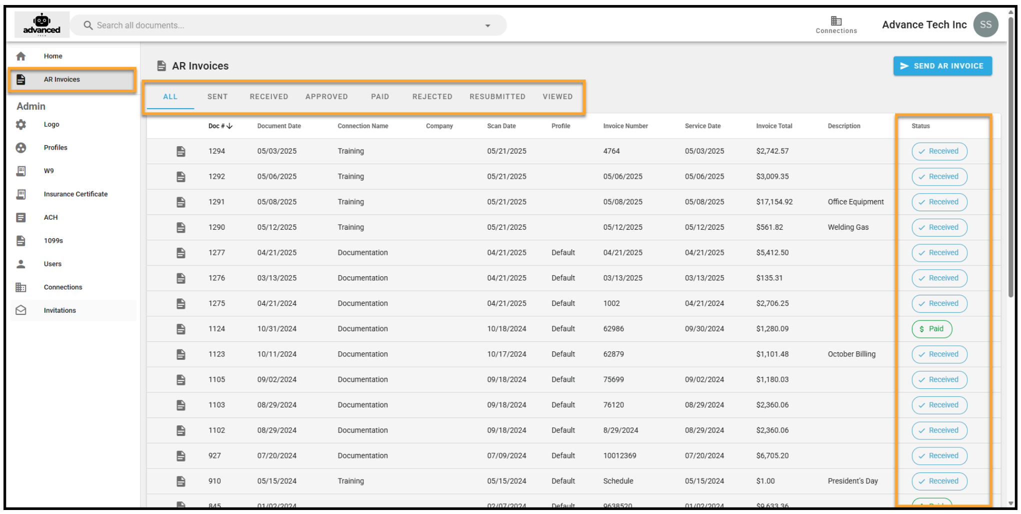
When you first log in to Pak Exchange, you will be greeted by a screen that looks similar to the one below. You will navigate to the AR Invoices tab on the left-hand side of your screen.



This tab provides access to all invoices submitted to your clients through the Pak Exchange Network. At the top of the screen, you'll find several filter tabs

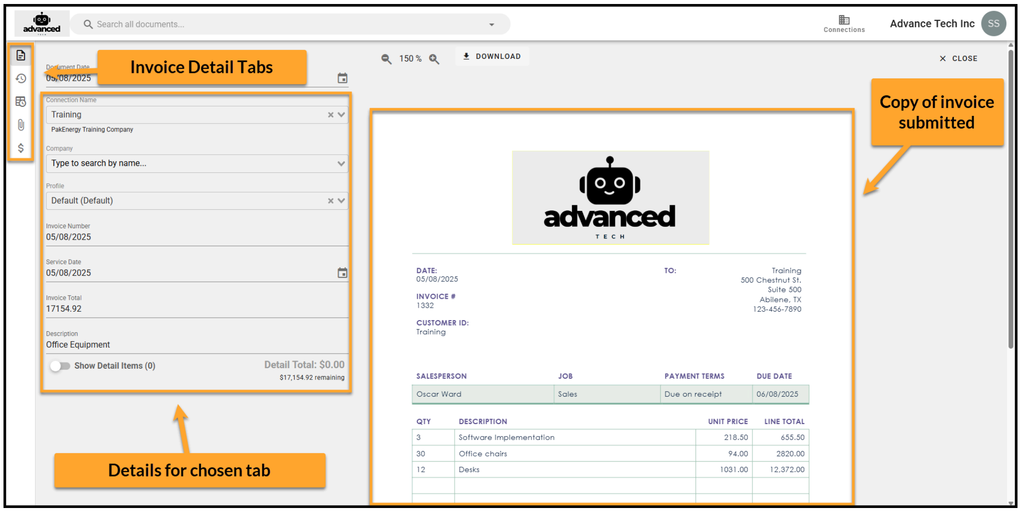
- such as All, Sent, Received Approved, Paid, Rejected and Resubmitted - that allow you to quickly locate specific invoices or check their current status in your customer's approval process.

The invoice grid displays key invoice information like Document Date, Org Unit, Invoice Number, and Invoice Total. Additionally, the Status column in the invoice grid offers a clear view of each invoice's current state, helping you stay informed and organized.



Tab	**Definition**
All	Displays all invoices submitted to your customers via the Pak Exchange Network.
Sent	Invoices are currently in transit to your customer.
Received	Invoices that have been sent to your customer and have been received by your customer.
Approved	Invoices have been approved for payment by your customer.
Paid	Your customer has paid the invoice. 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 been corrected and resubmitted to your customer but have not progressed in your customer's workflow.

Clicking on any of the invoices in the invoice grid will pull up a copy of the submitted invoice. The user can view all of the invoice details using the tabs on the left-hand side of the screen.

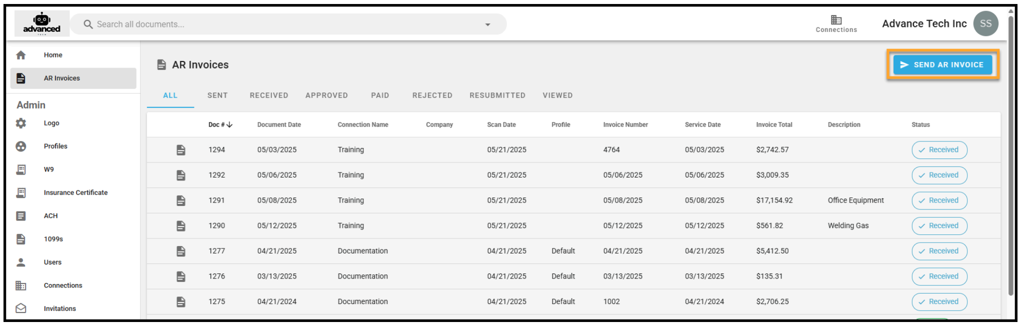


Tab	Definition
Metadata	Displays the data extracted or manually entered from your invoice.
Audit History	Tracks who submitted or modified the invoice and when.
Versions	Shows all versions of the invoice uploaded.
Attachments	Allows you to upload or view supporting documents such as delivery receipts, purchase orders, or terms and conditions.

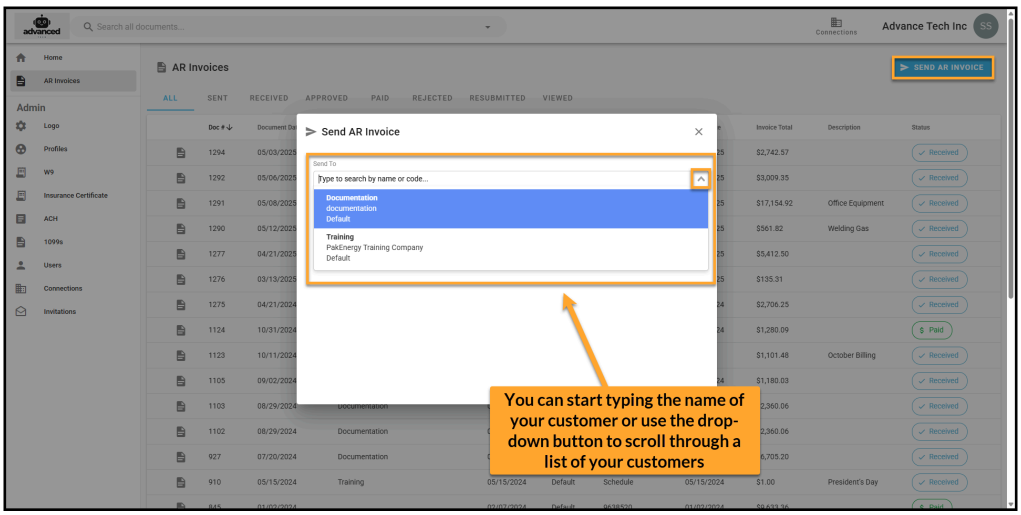
Submitting an Invoice

Now that we've covered the basics of the interface, let's walk through the process of submitting an invoice. Submitting an invoice through Pak Exchange is simple and intuitive, designed to streamline your workflow. With just a few steps, you can upload your invoice, enter the required details and send it directly to your customer for processing.

After clicking on the AR Invoice tab, please navigate to the top right-hand side of the screen and click on the blue, Send AR Invoice, button.

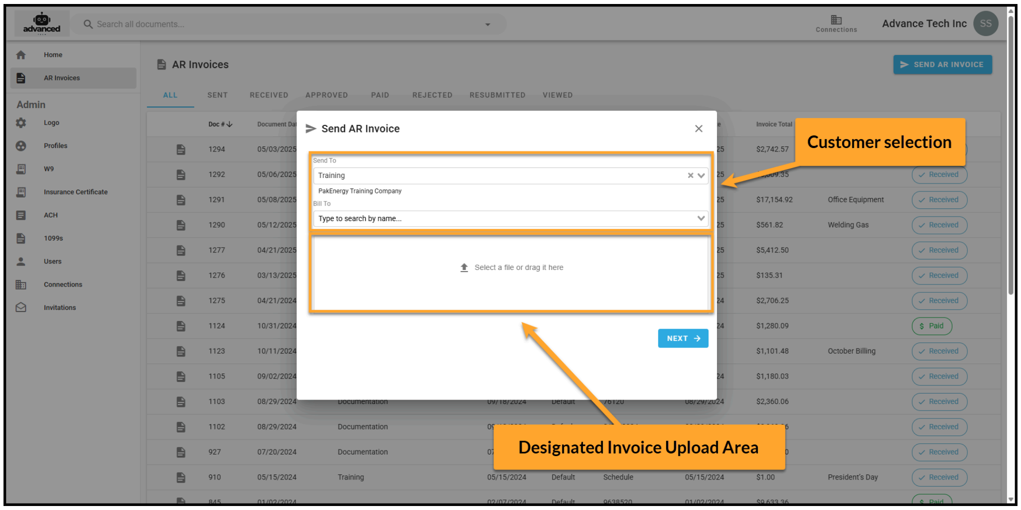


A pop-up box will appear, allowing you to choose which customer you wish to send the invoice to. You can start typing the customer's name, or you can use the drop-down arrow to scroll through your connected customers. **NOTE:** Your customer has to be connected with you on the Pak Exchange Network before you can send invoices to them.



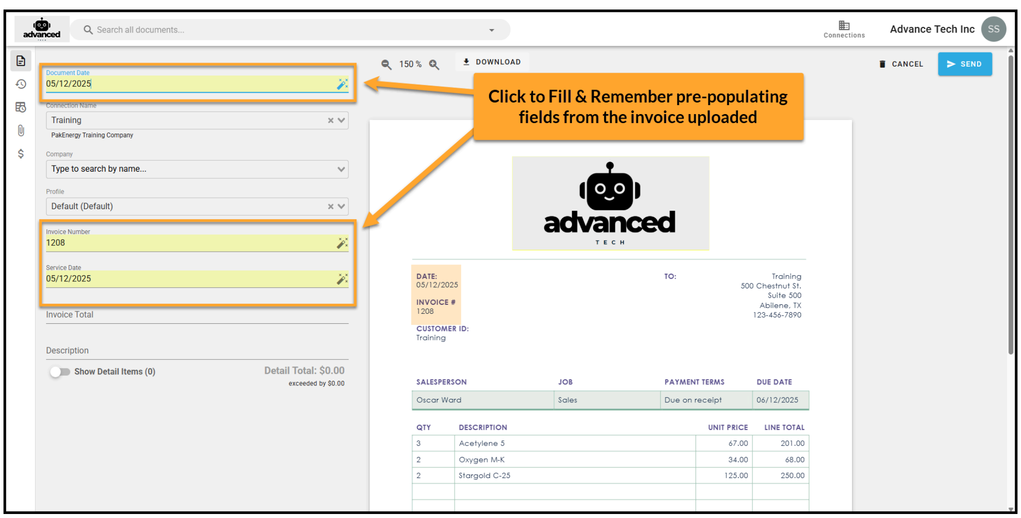
Once you've selected the appropriate customer, you may also have the option of choosing a Bill To address, if applicable. The Bill To field is optional when submitting an invoice in Pak Exchange.

Next, you'll upload your invoice from your local machine. You can either browse for the file using your file explorer or simply drag and drop the invoice into the designated upload area. Both options are designed to make the process quick and user-friendly.



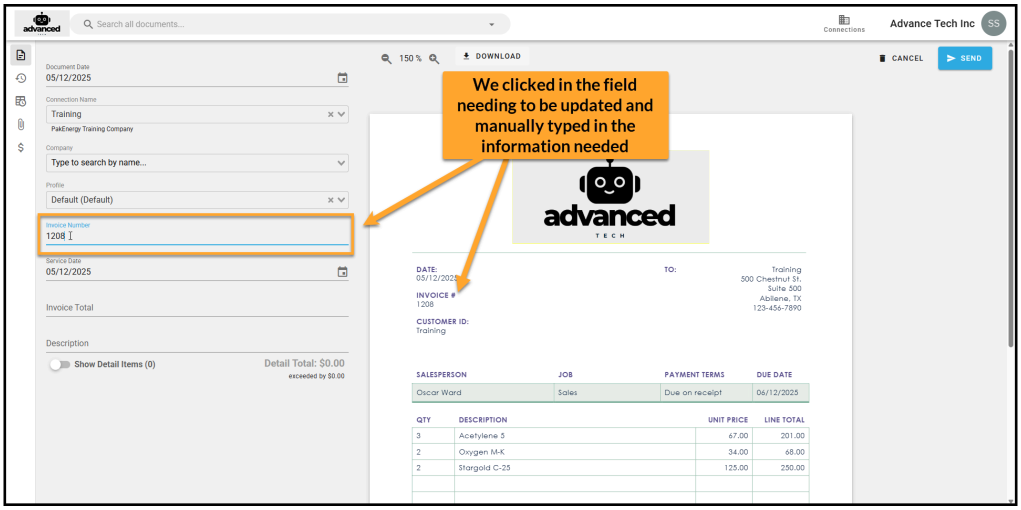
Once your invoice has been selected, click the blue Next button to proceed. On the following screen, you will be prompted to complete the required fields necessary for submission. As you continue using the system, you may notice a yellow highlight bar appearing over certain fields - this is part of the Click to Fill & Remember feature, which helps streamline data entry by learning from your previous inputs.

For example, in the scenario below, we have uploaded several invoices for our customer, Advance Tech. The Click to Fill & Remember feature has already pre-populated key fields such as Document Date, Invoice Number, and Service Date, based on prior submissions.

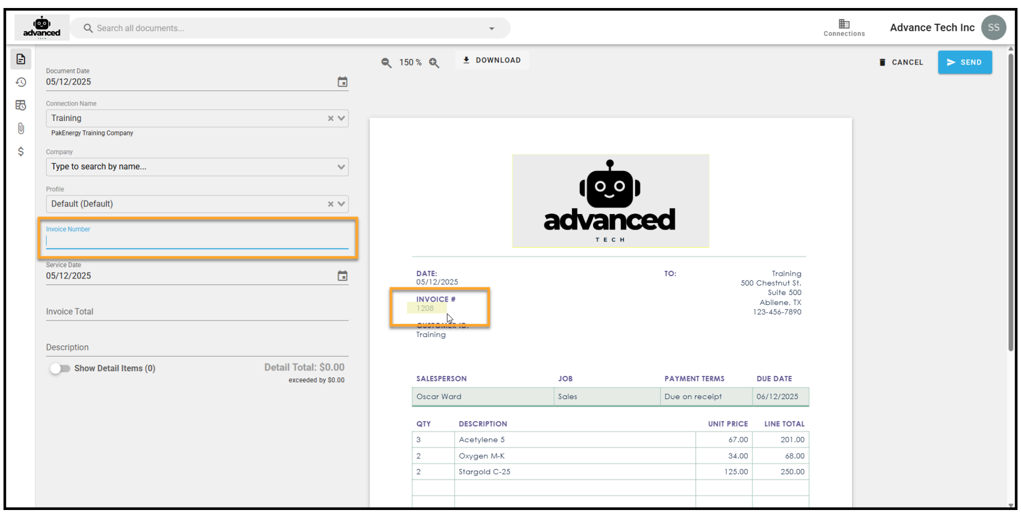


If this is the first invoice you are submitting to a customer, or if the Click to Fill & Remember feature has populated incorrect information, all fields can be updated as needed. You have two options for entering or correcting data.

The first is manual entry. Click the field on the left-hand side and type the correct information directly into the input box.

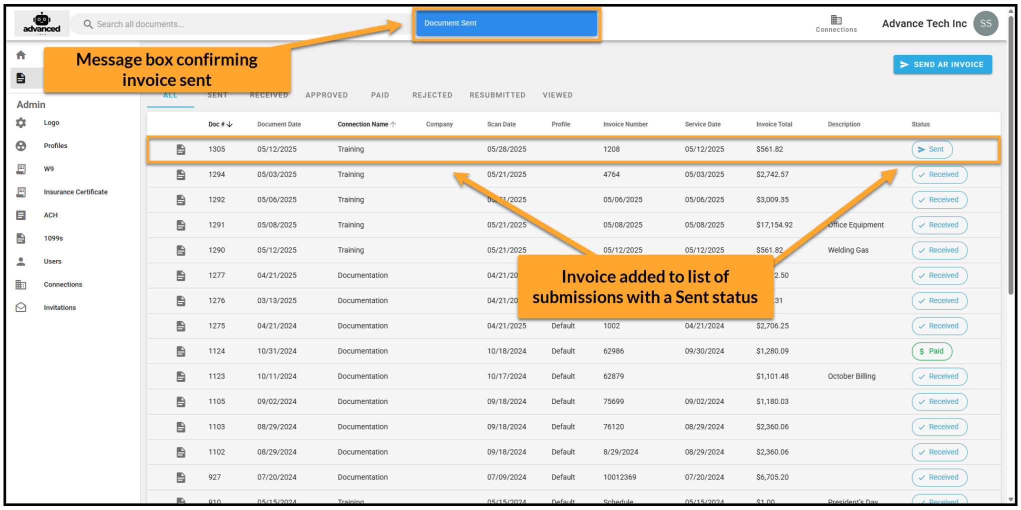


The second method is to use the Highlight to Fill feature. To do this, click on the left-hand side that you want to populate. Then, using your mouse, highlight the corresponding information directly from the invoice preview by clicking and dragging. The system will be automatically populate the selected field with the highlighted data. **NOTE:** Do not fill in the Description field or toggle on the Show Detail Item option unless specifically requested by your customer.



Once all required fields have been completed, click the blue Send button located in the top right-hand corner. The system will then upload your invoice and automatically return you to the invoice tab. At this point, the status of your invoice will be updated to Sent and a blue message box will appear confirming that the invoice has been sent.

Once the invoice has been successfully received and acknowledged through the Pak Exchange Network, the status will update to Received.



That's it! If you have additional invoices to submit, you can do so at any time by clicking the blue Send AR button, as outlined earlier in this guide.