BILLBAY

Seamlessly exchange Peppol E-Docs
(Invoices, Orders & Responses)

User Guide

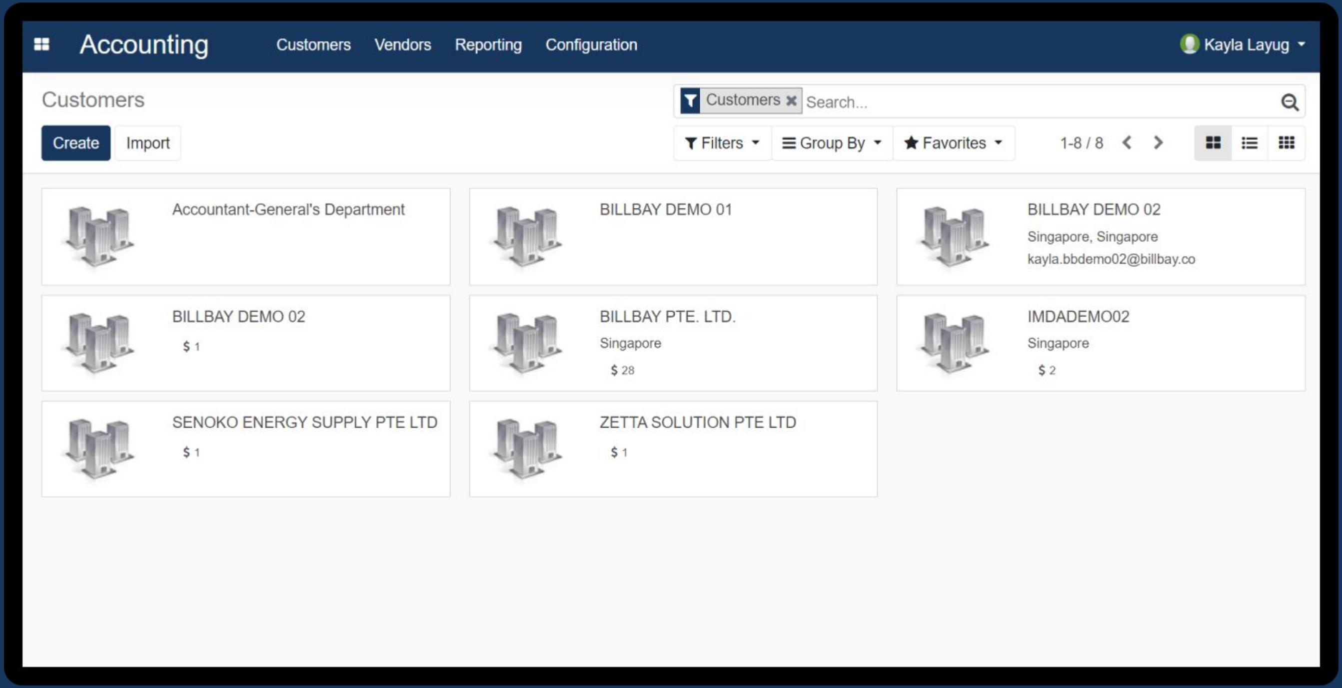
BB01 Sending E-Invoices

Login to our Peppol-Ready Solution:
invoice-now.billbay.co/

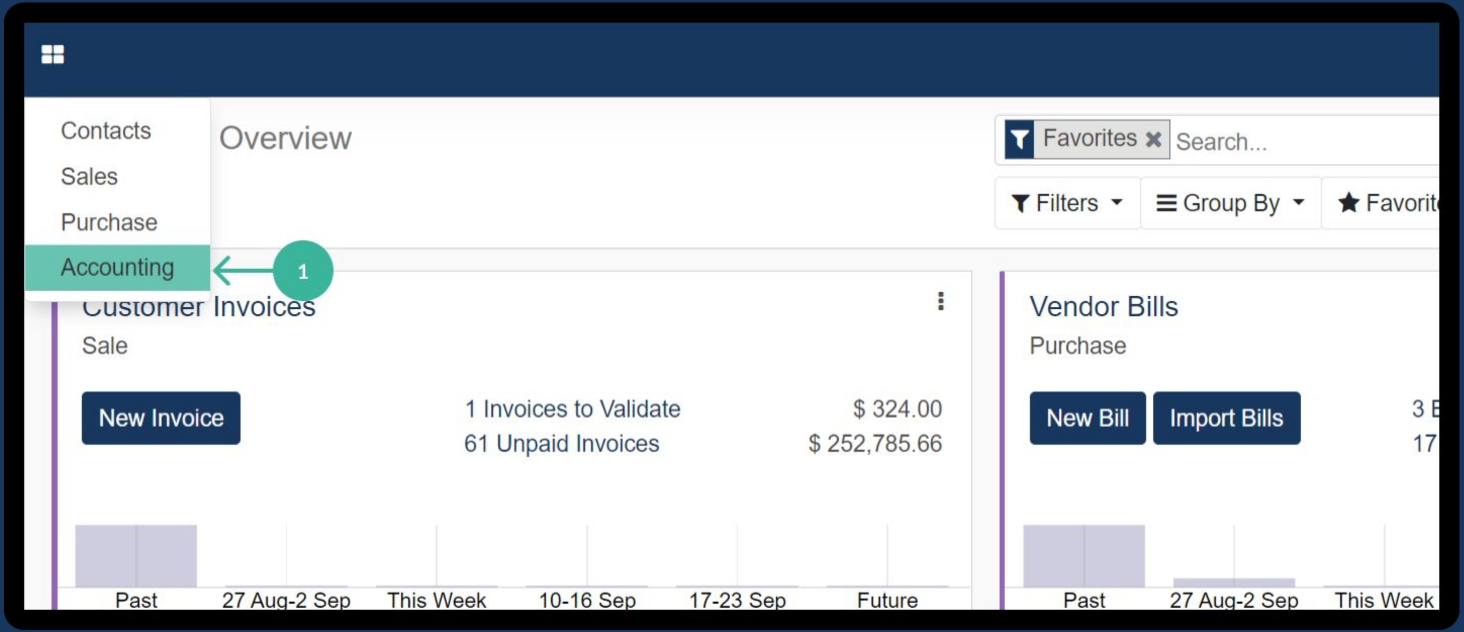
Sign-up:
billbay.io/signup

Enquiry:
invoicenow@billbay.co

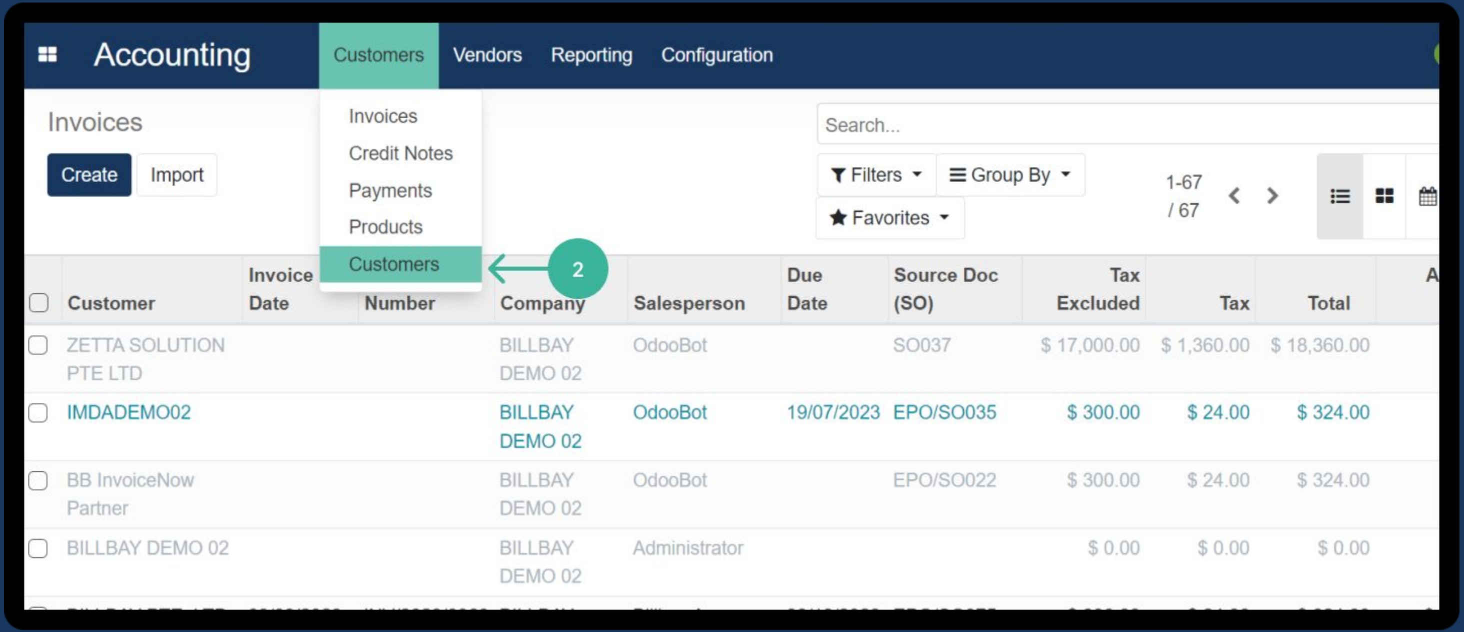
Before you can transact with any partner, it is advisable to create a Partner Record via the Customer Master Data.



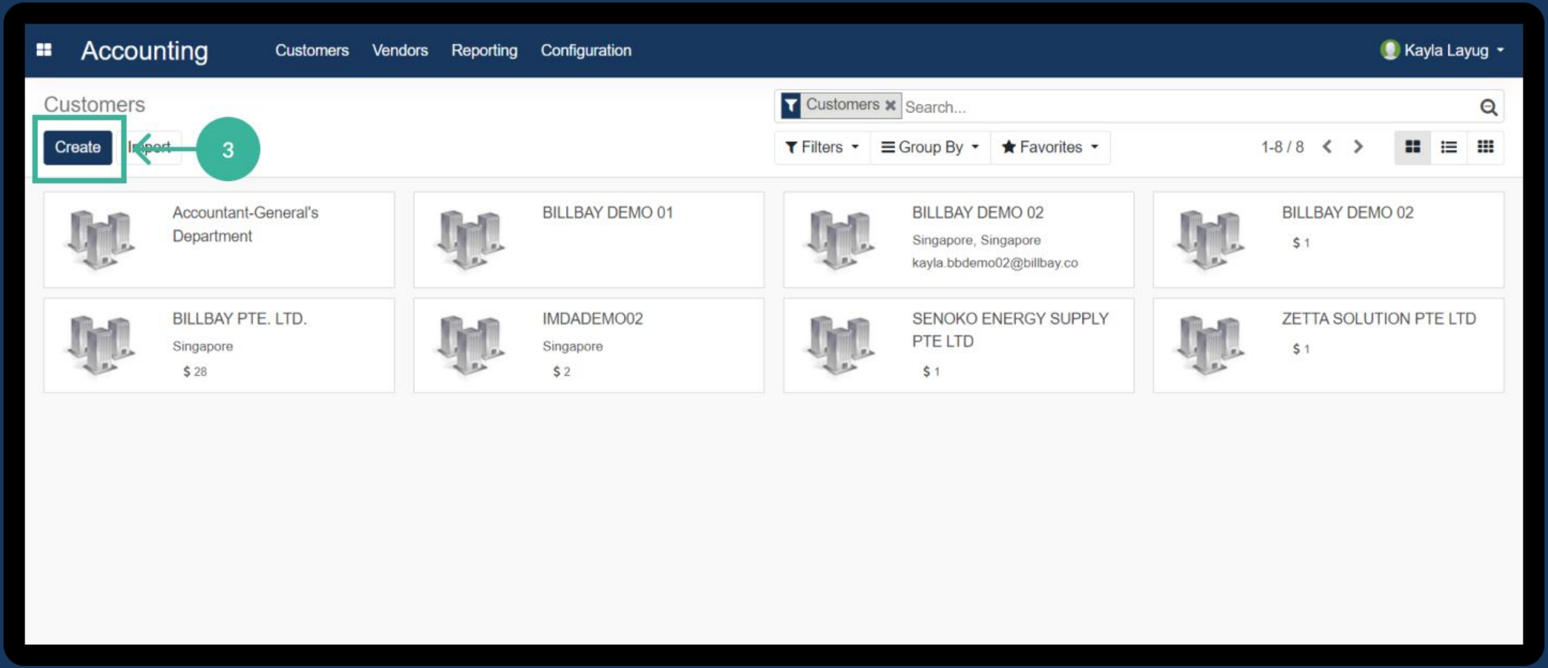
STEP 1: Access the Accounting Module.



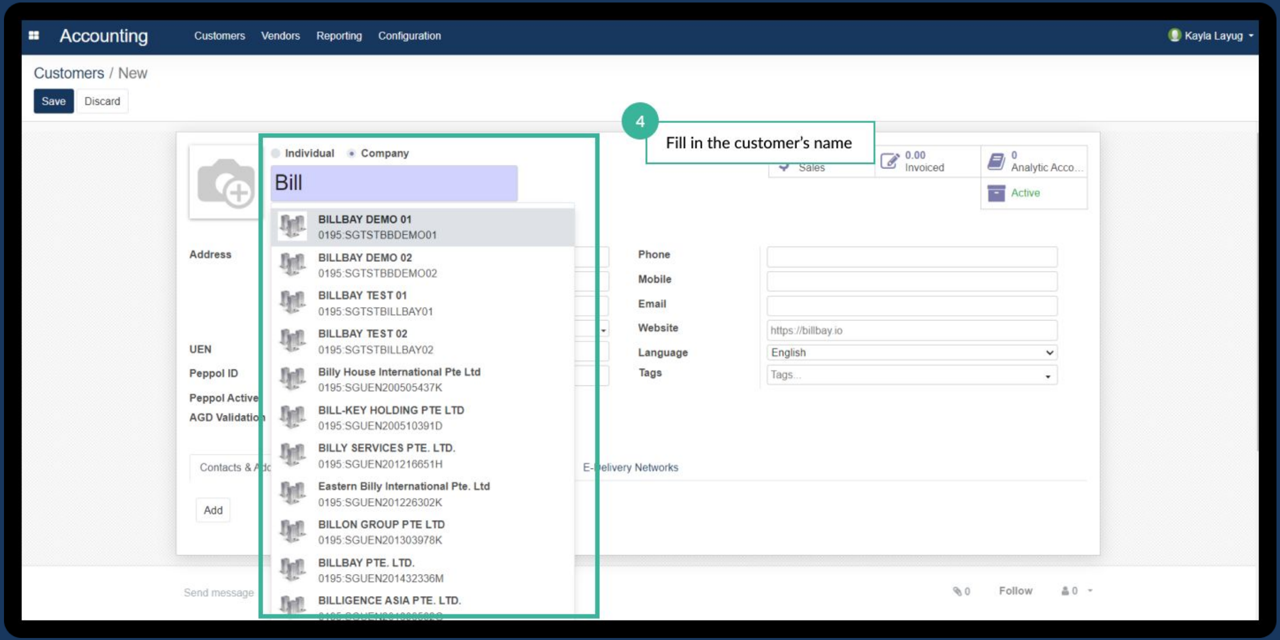
STEP 2: Click on the 'Customers' option in the top bar and click on the ‘Customers’ on the dropdown menu to proceed.



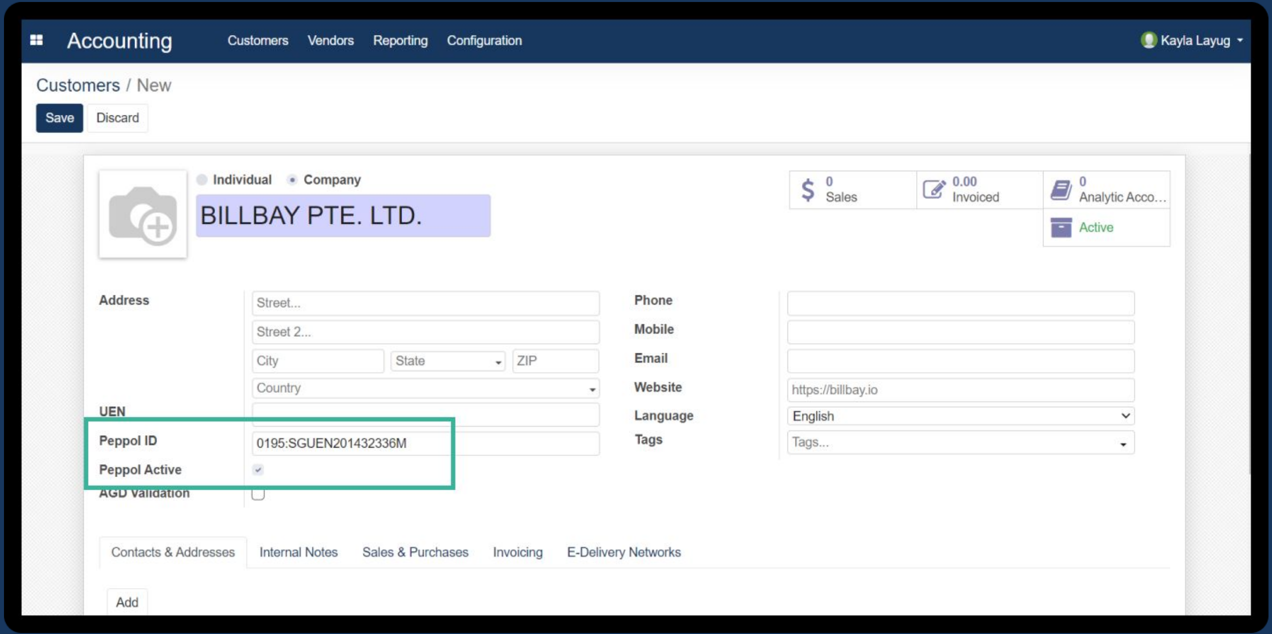
STEP 3: Once in the 'Customers' section, look for the button 'Create'.



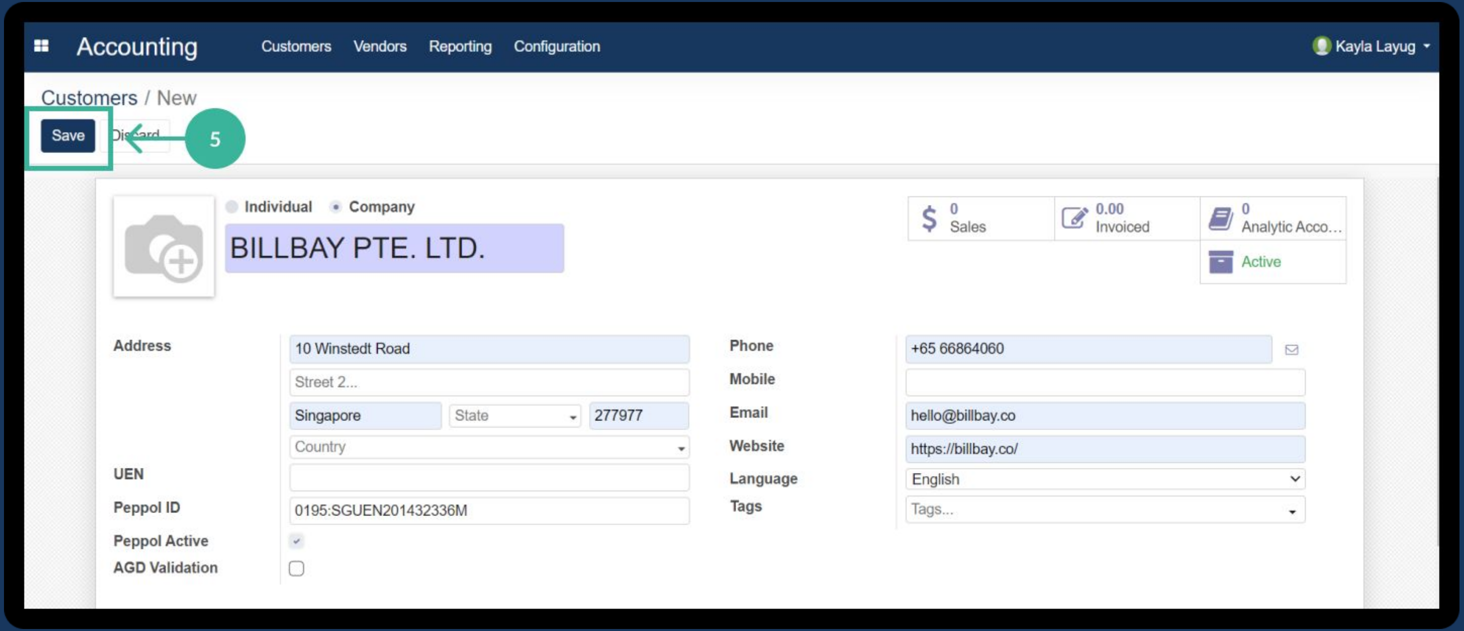
STEP 4: When entering a customer's name, an active lookup quickly displays potential matches, making it easy to select the customer as you type.



Customer's Peppol ID filled in automatically, and the Peppol Active flag is set to Yes by default. This default setting plays a crucial role in deciding when to send E-Invoices. If a partner doesn't want to receive E-Invoices, you can easily change this. Just click the Peppol Active checkbox to turn off.

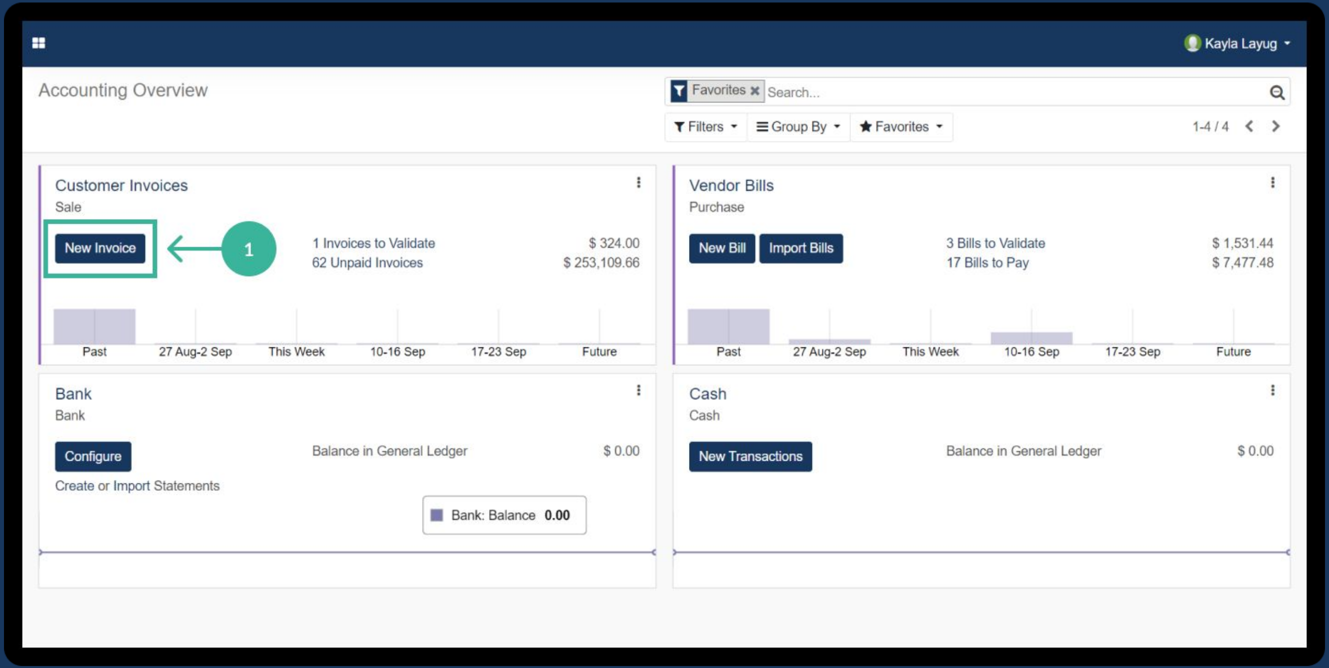


STEP 5: After double-checking that all details are correctly entered, locate the 'Save' button. Your Customer data is now ready to be used in a transaction.



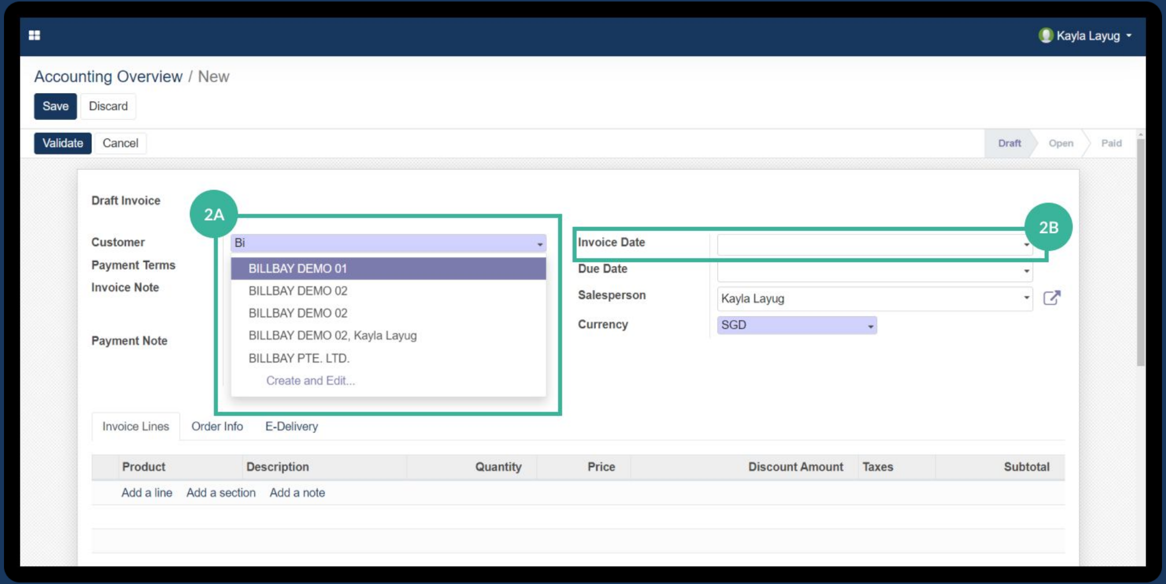
Sending Non-PO Based Invoices

STEP 1: Click the 'New Invoice' button to create a new invoice.

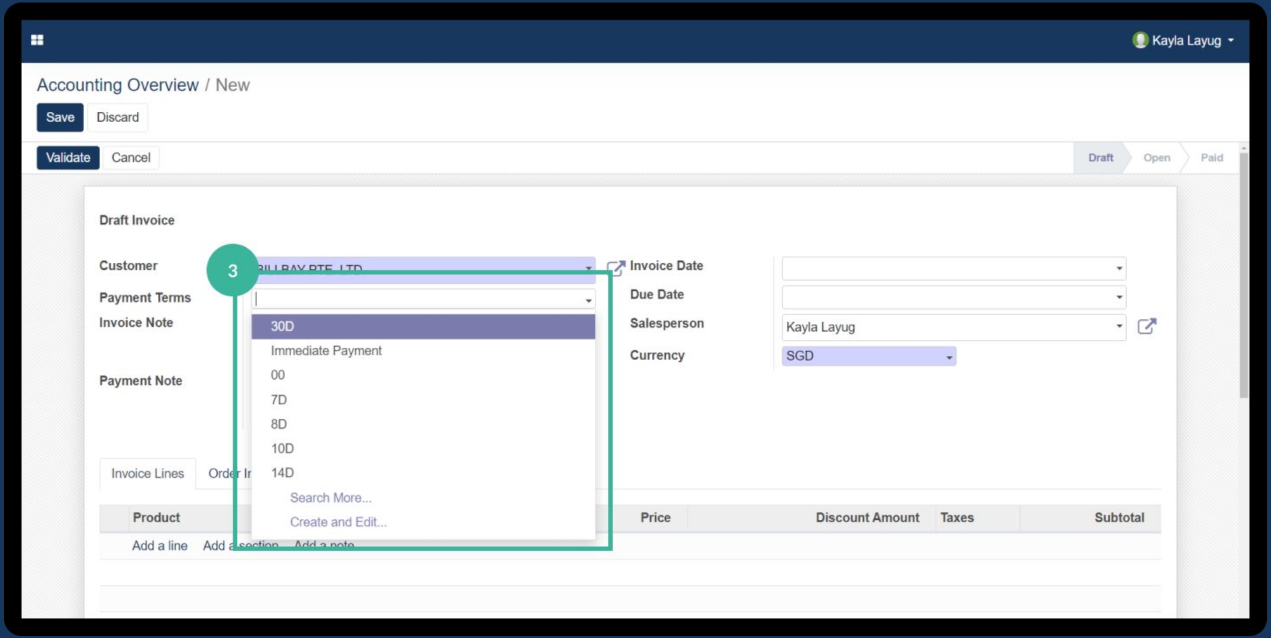


STEP 2A: Select a customer, and if the customer doesn't already exist, begin creating a new one by entering their name. **STEP 2B:** Input the invoice date or leave it as blank. The system will then default it to the current date.

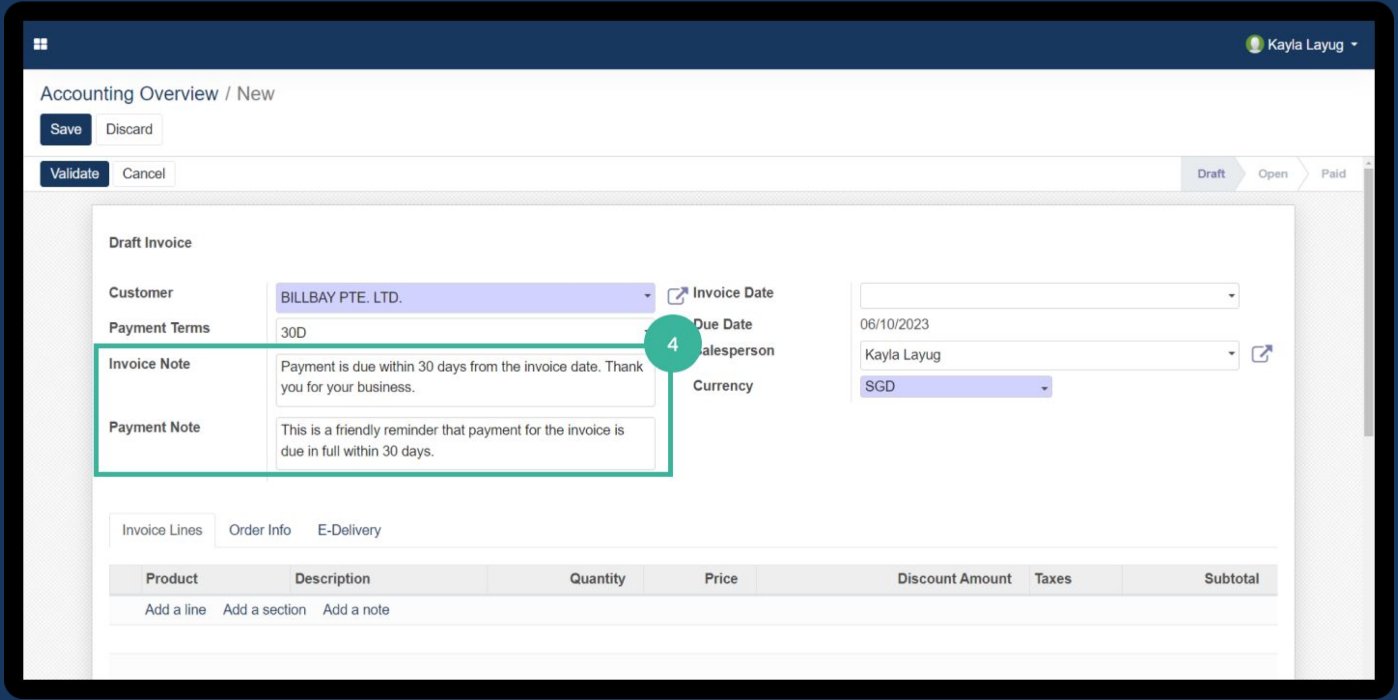
Note: It is advisable to create a customer record via the Customer Master Data module. Follow the steps on page 2 to create



STEP 3: Choose a payment term (create a new one by typing it if it's not already in the system), and based on the chosen payment term, the due date will be automatically calculated when the invoice is finalized.

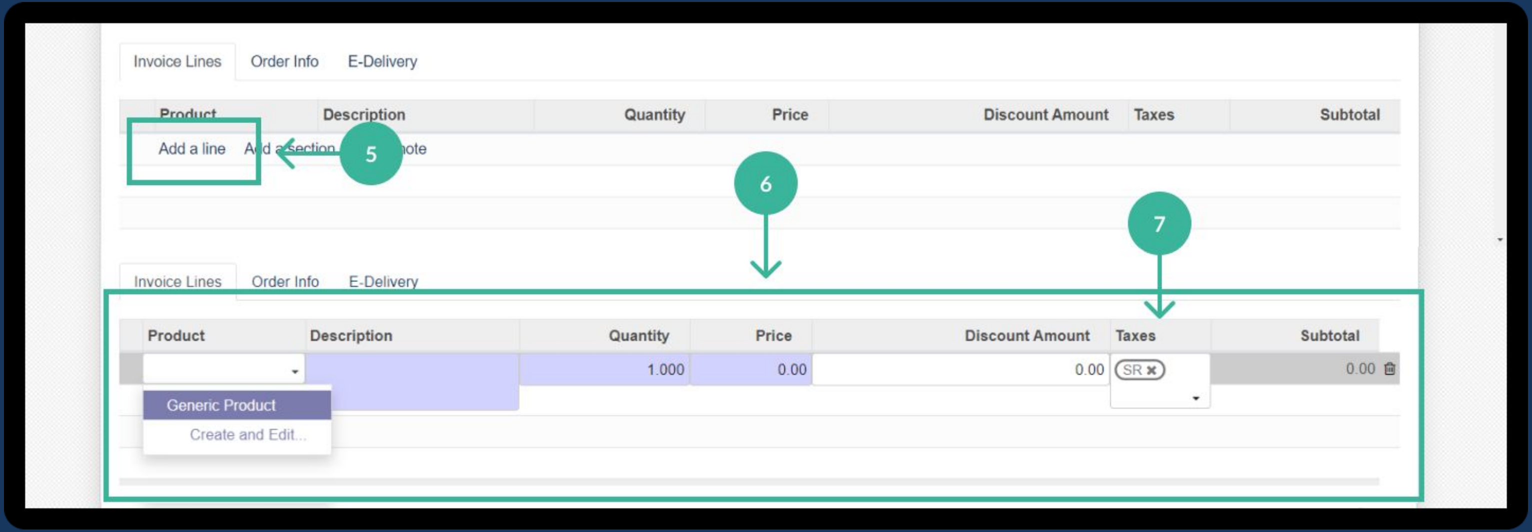


STEP 4: Enter the Invoice note and Payment Note. (Optional)

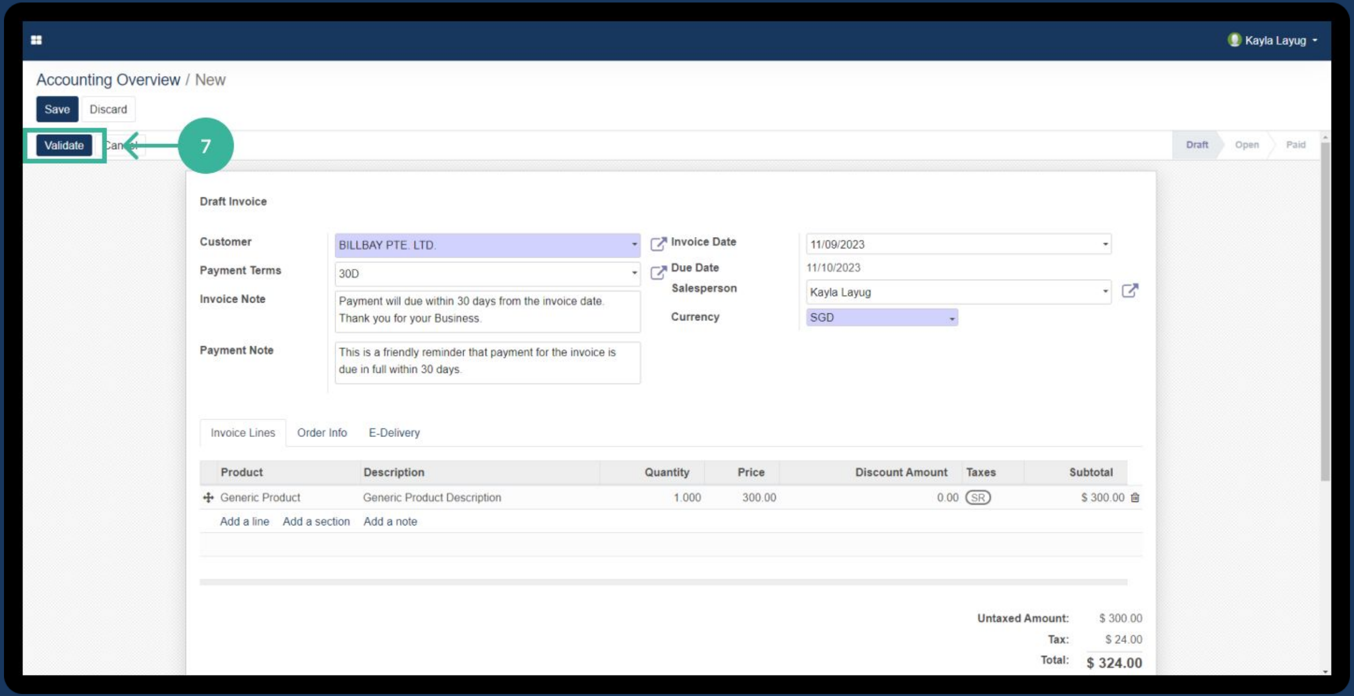


STEP 5, 6 & 7: Choose the generic product, enter the full description of the item or service you want to charge, and ensure the correct taxes are applied.

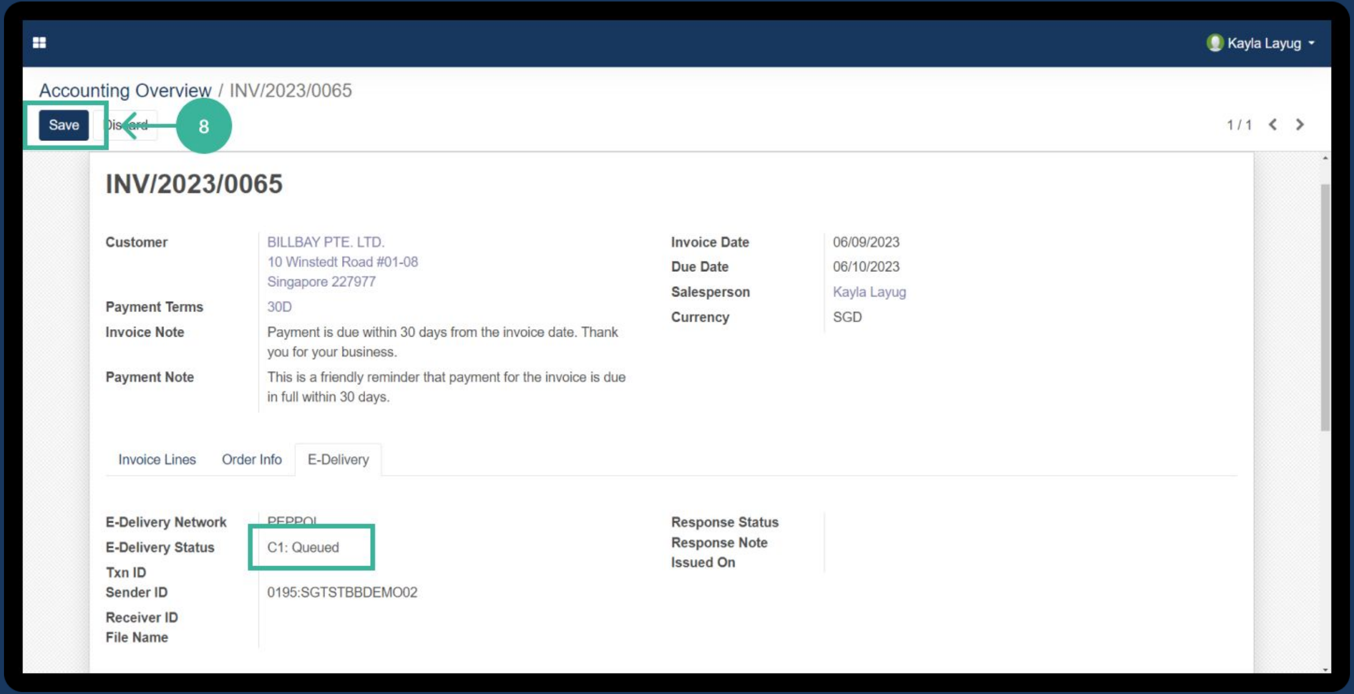
You may alternatively create a new product with appropriate product master data. Take note that only what is typed in the Product Description will be sent across to the Customer.



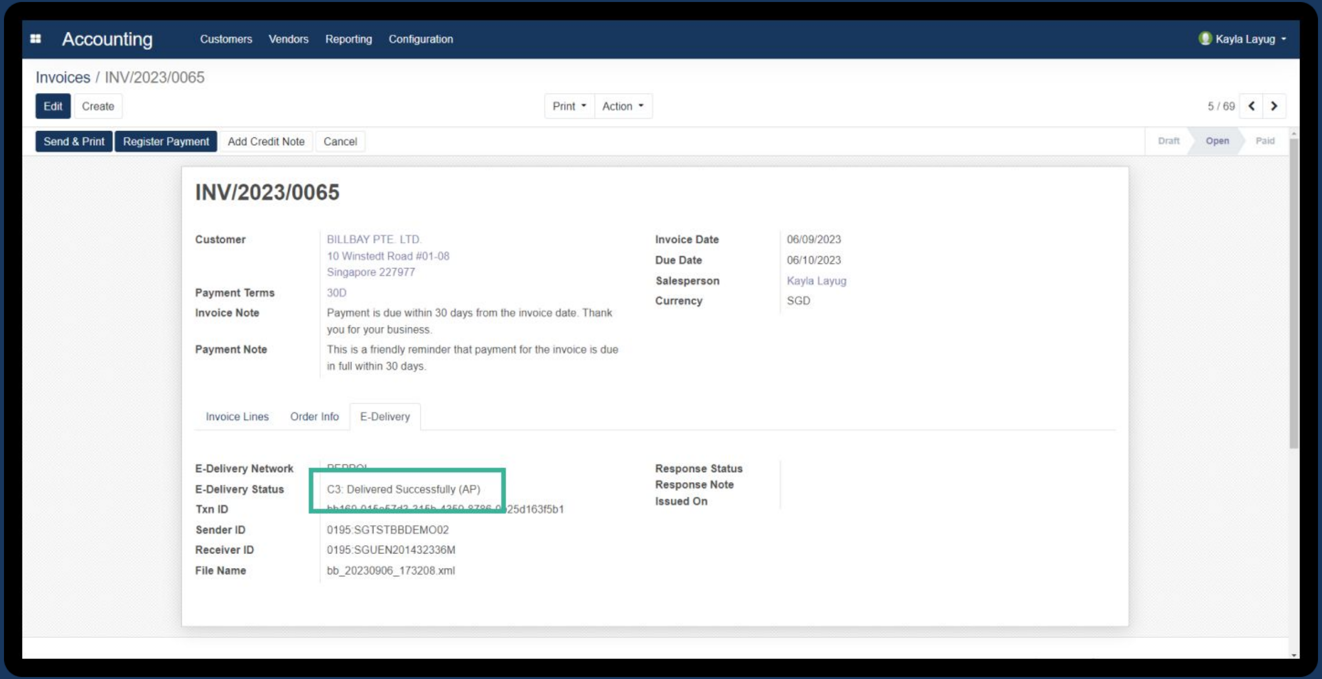
STEP 7: Once all data is entered finalize by clicking the 'Validate' button



STEP 8: Once the invoice is validated and a matching Peppol ID is found, the invoice will be queued for transmission via InvoiceNow. Within a few minutes the E-Delivery Status changes.



Upon successful delivery of the invoice, the E-Delivery Status will be updated to "C3: Delivered Successfully."



THANK YOU

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