Userguide BEAst Invoiceportal
Invoice issuer

Read this first:

I have entered invoices earlier in the old portal (eBuild) and now want to enter invoices in BEAst Portal for the first time :
> Go to BEAst Portal Log in.
> Enter the same user name you had in eBuild and click on button 'Login'.
> New password is now sent to your email address.
> If you do not receive an email with new password; contact BEAst Support.
> You do not need to activate any invoice recipients. They are already copied from eBuild to BEAst Portal.
> You do not need to enter any items. They are already copied from eBuild to BEAst Portal.
> Go to part 4 in this document, (Invoicing).

I have NOT entered any invoices earlier in the old portal (eBuild) and now want to register my company in BEAst Portal
> Go to part 1 in this document, (Register Company information).

I have registered my company in BEAst Portal and will enter invoices for the first time:
> Log in BEAst Portal.
> Go to part 2 in this document, (Login and select invoice recipients).
> Go to part 3 "   , (Manage items).
> Go to part 4 "   , (Invoicing).

Jag want to enter invoices in BEAst Portal and send to invoice recipients:
> Log in BEAst Portal.
> Go to part 4 in this document, (Invoicing).

I want to add a new user to BEAst Portal:
> Log in BEAst Portal.
> Go to part 5.2 in this document, (Add users).
> Username and password will automatically be sent by email to the new user.

I want to activate a new invoice recipient in BEAst Portal:
> Log in BEAst Portal.
> Go to part 2 in this document, (Login and select invoice recipients).

I want to add new items in BEAst Portal:

Log in BEAst Portal.
Go to part 3 in this document, (Manage items).

I want to change my company's bank details in BEAst Portal:
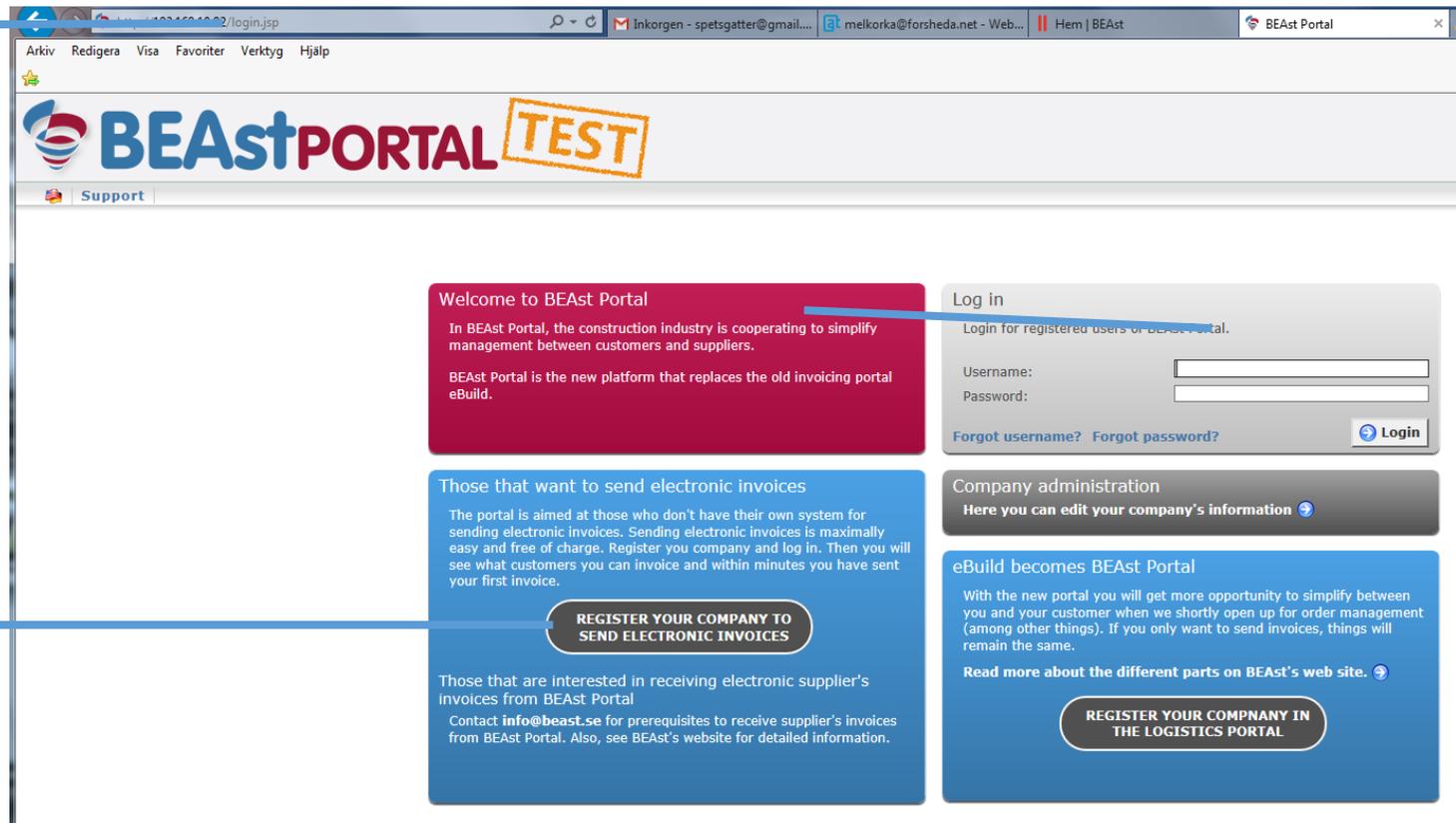
Log in BEAst Portal.
Go to part 5.4 in this document, (Company settings).

Table of contents

Search for beastportal.com

1   Register Company information

Click on 'Register your company to send electronic invoices'

Register Invoice issuer

Name & Address

Name:	Flanagan Cleaning	*
Department:		
Street:		
Postal box:		
Building:		
ZIP Code:		*
City:	Dublin	*
Country:	IE (Irland)	*

Identities

Organisation number:	123456	*
VAT no:	123456	*
GLN:		
Account no:		
Group Account no:		

Subscriber

First and last name:	Fiona Flanagan	*
Telephone:	010101010	*
Email address:	bengt.hellman@tyringe.com	*
Repeat email address:	bengt.hellman@tyringe.com	*

→ Continue

Fields marked with (*) are mandatory

Enter the mail address that shall receive the login information

End with click on 'Continue'

On next view select a user-ID, e.g. company name

Enter the code that has been sent to the previous given email address.

Click on 'Register'

After a while login information will be received by email.

Register Invoice issuer part 2

Accept the terms

User ID	CLEAN	*
I accept the terms:	☑	*

An email containing the registration code has been sent to the subscriber address: bengt.hellman@tyringe.com

Enter code:	Si917f	* Didn't you receive an email. Click back and check subscriber email address and then click continue again

→ Register   ← Back

Register Invoice issuer part 3

Invoice issuer

Name:	Flanagan Cleaning *
Department:	
Street:	
Postal box:	
Building:	
ZIP Code:	9922 *
City:	Dublin *
Country:	IE (Irland) *
Organisation number:	123456 *
VAT no:	123456 *
GLN:	0

Copy from company

Payment receiver

Name:	Flanagan Cleaning *
Department:	
Street:	
Postal box:	
Building:	
ZIP Code:	9922 *
City:	Dublin *
Country:	IE (Irland) *
Organisation number:	123456 *
VAT no:	123456 *
GLN:	0
Bank giro no:	
Bank acc no:	
Postal giro no:	
IBAN:	
BIC:	

Copy from company

If the Invoice issuer or Payment receiver differs from the previous registered company user data, this information must be entered. Otherwise it is possible to copy the information from the company information by clicking on the Copy button.
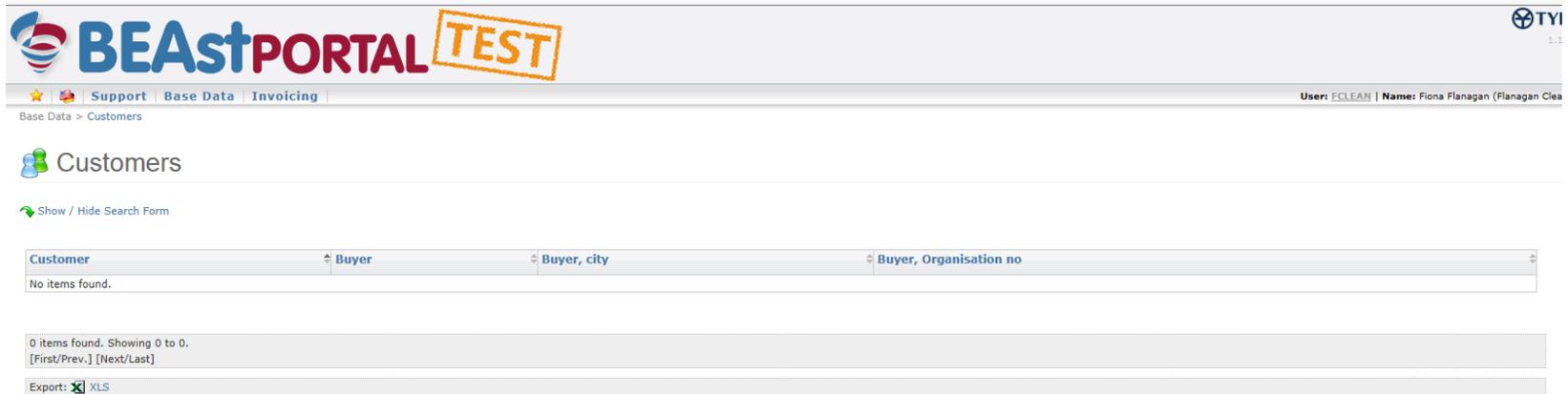
Tax agent

Name:	
Department:	
Street:	
Postal box:	
Building:	
ZIP Code:	
City:	
Country:	
Organisation number:	
VAT no:	

✔ Save

Confirm your entries clicking 'Save'

Administrate company Flanagan Cleaning, 123455

Company | **Administrators**

Name & Address

Name:	Flanagan Cleaning *
Department:	
Street:	
Postal box:	
Building:	
ZIP Code:	9922 *
City:	Dublin *
Country:	IE (Irland) *

Identities

Organisation number:	123455 *
VAT no:	123455 *
GLN:	0
Account no:	
Group Account no:	
Peppol ID:	

Other

BEAst member:	No *
Annual turnover, millions:	0 *
Currency:	SEK (Svenska kronor) *

Invoicing

Invoicing method	*
Email address for PDF invoice:	*

Select which parts of the portal to sign up for

Provider of contstruction services: ☐
   Integrated user: ☐
   I accept the terms: ☐

Supplier of material: ☐
   TA functions: ☐
   Integrated user: ☐
   I accept the terms: ☐

Buyer of construction services: ☐
   Integrated user: ☐
   I accept the terms: ☐

Buyer of material: ☐
   TA functions: ☐
   Integrated user: ☐
   I accept the terms: ☐

Select which parts of the invoice portal to sign up for

Invoice issuer: ☑
   I accept the terms: ☐
Invoicee: ☐
   I accept the terms: ☐

Reports

Report new invoicing suppliers:	Never	*
Report number of invoices:	Never	*
Email address for reports:		
Repeat email address:		

Once the company and user data are entered (previous step) the administration view appears. This is just a summary and information of what is entered in the previous steps.
If needed it is possible to change those data afterwards.
Log out to end this administration step.

2   Log in and select invoice recipients

When you are registered log in on beastportal.com with the user information that has been provided by email.

BEAstPORTAL

☆ | Support | **Base Data** | **Invoicing**
Base Data > Customers

Company related
Customer related   Customers
Item related
General

Customers

BEAstPORTAL TEST

☆ | Support | Base Data | Invoicing   User: FCLEAN | Name: Fiona Flanagan (Flanagan Clea
Base Data > Customers

Customers

Show / Hide Search Form

Customer	Buyer	Buyer, city	Buyer, Organisation no	
No items found.				

0 items found. Showing 0 to 0.
[First/Prev.] [Next/Last]

Export: XLS

☐ Add

Click 'Add' το create a new customer to receive the invoices

BEAstPORTAL TEST

Support | Base Data | Invoicing

Base Data > Customers > Add customer

Add customer

Company/Corporate group	Country	Organisation no	Buyers
Beijer Bygg	SE	5560125220	Show/Hide
Cramo	SE	5561043539	Show/Hide
Inwido Sverige AB	SE	5565834693	Show/Hide
JM AB	SE	5560452103	Show/Hide
NCC DK	DK	00	Show/Hide
NCC NO	NO	000000000	Show/Hide
NCC SE	SE	5560345174	Show/Hide
PEAB	SE	5560999202	Show/Hide
PEAB Asfalt	SE	5560988122	Show/Hide
PEAB AB	SE	5560614330	Show/Hide

Click on 'Show/Hide' to display all invoice recipients for the selected company.

Inwido Sverige AB	SE	5565834693	Show/Hide			
JM AB	SE	5560452103	Show/Hide			
NCC DK	DK	00	Show/Hide			
NCC NO	NO	000000000	Show/Hide			
NCC SE	SE	5560345174	Show/Hide			
				Name	**Country**	**Organisation no**	**Customer no**
				Boende Jacki...	SE	5560510014	
				NCC Fastigheter	SE	5566554100	
				NCC SE	SE	5560345174	
PEAB	SE	5560999202	Show/Hide			
PEAB Asfalt	SE	5560988122	Show/Hide			
PEAB AB	SE	5560614330	Show/Hide			

Click on a selected line to assign your invoice recipient. This will move you to the next view

15 items found. Showing 1 to 10.
[First/Prev.] 1, 2 [Next/Last]

Export: XLS

Back

Adressinfo

Buyer

GLN:	7381020150658
VAT no:	SE556012522001
Name:	Beijer Byggmaterial Norrköping
Street:	
Postal box:	FE 860
City:	Frösön
ZIP Code:	83826
Country:	SE (Sweden)
Building:	Filial 065
Organisation no:	5560125220
Fiskal no:	
State ref no:	
Tax registration no:	

✔ Choose company as customer   ✖ Cancel

Click 'Choose company as customer'

New customer

Customer

Customer no:		*
ID:	5560125220
My GLN at customer:	0
My ID at customer:	5565313151

Customer's contact at supplier

Name:	Tyringe Support *
Phone nbr:	0451 570 70
SMS:	
Email:	support@tyringe.com *
ID:	

✔ Save   ✖ Cancel

Enter your company's customer number for the current customer. Note! The customer no must be unique within the company.

Click on 'Save'

3 Manage items

NOTE! It is not required to use items to send an invoice, but It makes your work easier.
You can create an item to default price, VAT rate and pricing unit of measure. This means that you do not have to register this information every time you create a new invoice line.
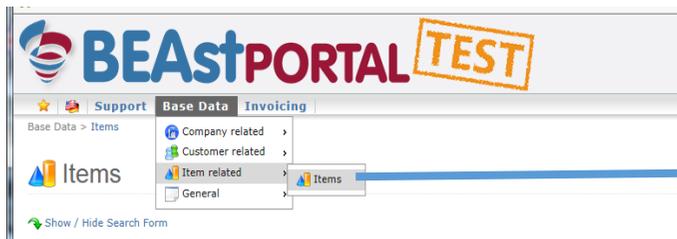
Click on 'Items' and 'Add' on the following view to enter your first item, or to create a new item.

To copy or edit an existing item right click on the selected item and choose the preferred action.

3.1 Add an item

Add Item

BEAstPORTAL TEST

Support | Base Data | Invoicing
Base Data > Items > Item
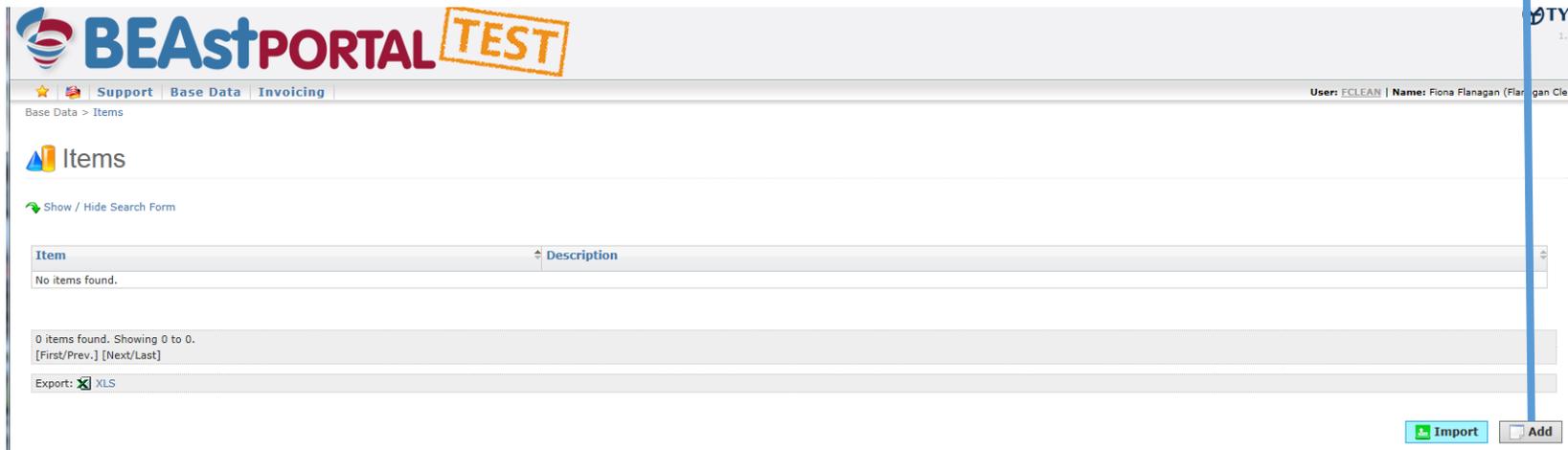
| Item | Item alias |

Identity
Item: _____ *
Description: _____ *

General
Type: [____ ▼]
Net weight (kg): [____]
Weight quantity: [____]
D-label: [____ ▼]
Length (m): [____]
Width (m): [____]
Height (m): [____]
Composed item: [No ▼]
Drawing no: [____]
Harmonize syst code: [____]
Serial number: [____]
Country of origin: [____ ▼]

Price and Tax Info
Price amount: [____]
Price code: [____ ▼]
Price type code: [____ ▼]
Price specific code: [____ ▼] [__ ▼]
Price basis qty: [____ ▼]
Price measure unit: [____ ▼] [__ ▼]
Tax class: [Choose One ▼] *
Tax exemption,text: [_____]

Default packaging
ID: [__ ▼]
Quantity: [____]

Dangerous goods
Dangerous goods: [__ ▼]
Hazardous code: [____]
Dang Goods code: [____]
Packing group, Dang Goods: [____]

✔ Save   ✘ Cancel

To add a new item enter all the details of the item. Fields marked with (*) are mandatory.

To edit an existing item simply change the defaulted data.

To copy an existing item to a new, give it a new item no and change any other field to reflect the new item information.

Confirm any changes with the "Save" button

4   Invoicing

A new invoice can be created either:
1. Create a new invoice
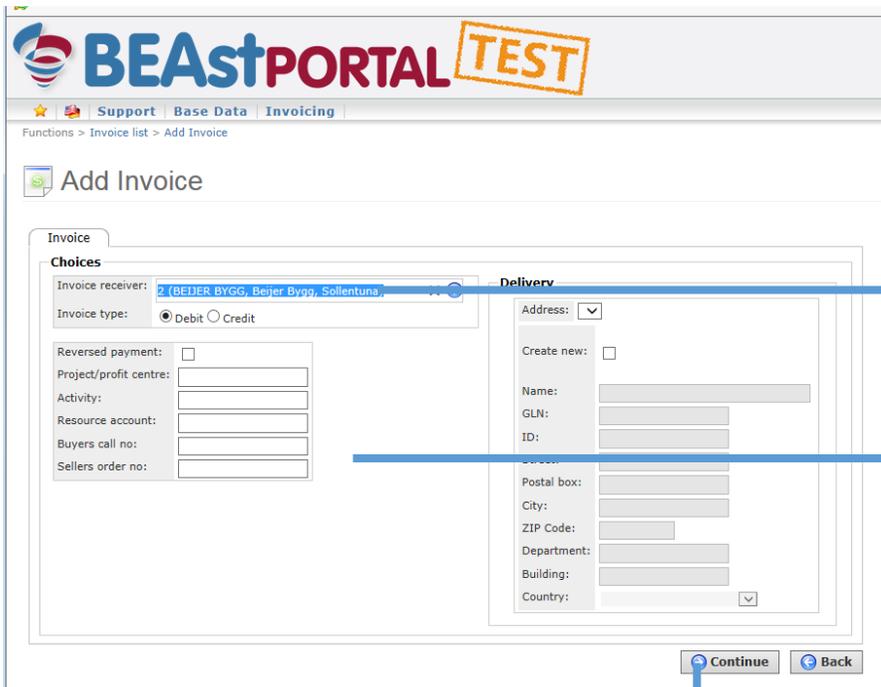*or*
2. Copy an existing invoice

Click on 'Invoice'
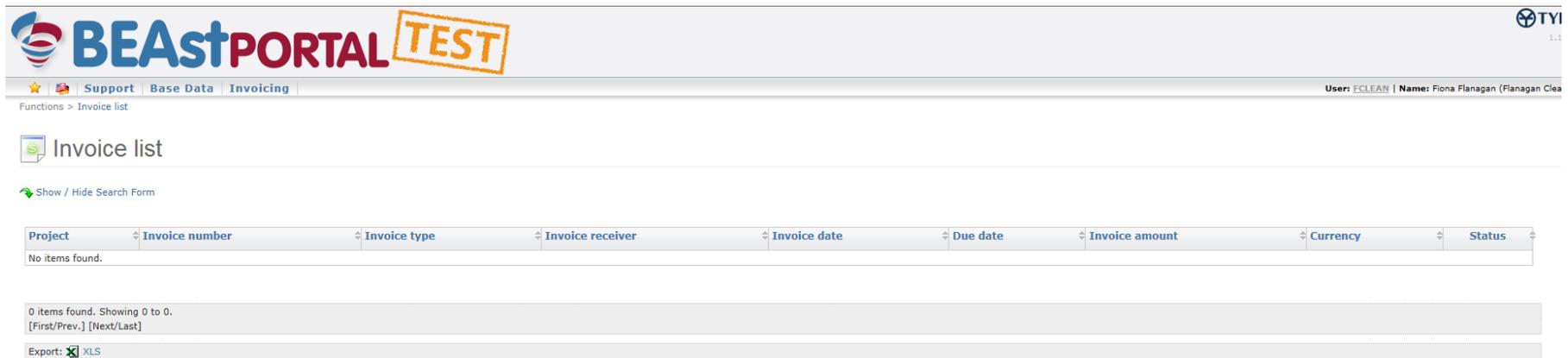
4.1   Create a new invoice

Click on 'Create invoice'

BEAstPORTAL TEST

Support | Base Data | Invoicing

Functions > Invoice list > Add Invoice

Add Invoice

Invoice

Choices

Invoice receiver: 2 (BEIJER BYGG, Beijer Bygg, Sollentuna,

Invoice type: ● Debit ○ Credit

Reversed payment: ☐
Project/profit centre:
Activity:
Resource account:
Buyers call no:
Sellers order no:

Delivery

Address: [▾]

Create new: ☐

Name:
GLN:
ID:
Street:
Postal box:
City:
ZIP Code:
Department:
Building:
Country: [▾]

[Continue] [Back]

Enter:
- Invoice receiver
- Debit/Credit
If customer not found it must be added. Look att page 9, Add customer or click on line "If the invoice recipient is missing, click here for activation" and go to page 10.

If an invoice receiver requires a Project number, a new view is shown where information related to this project appears. If reversed payment is chosen it will be valid for the total invoice.

Click 'continue' to proceed to the next entry screen

Add Manual Invoice - Invoice (Invoice initiated, not send)

Head

Addresses

Invoicee	Buyer	Delivery
Invoicee	Buyer	Delivery
Name: Beijer Bygg	Name: Beijer Bygg	Address:

General

Invoice number:		Currency:	SEK (Svenska kronor)	Terms of payment:	
Invoice date:	20160517	Date of delivery:	20160517	Due date:	20160517
Sellers order no:		Sellers ref/contact/name:		Dispatch no:	
Buyers call no:		Buyers ref/contact/name:		Buyer ph:	
Freight cost:		Other costs:		Discount:	
Message:					
Project:					
Activity:					
Resource account:					

Attachments

Bläddra...
Files (maximum 10):

Rows

Row	Item number	Item description	Del. dte	Ord. qty	Invoiced qty	A-price	Unit	VAT	Discount per unit	Sum
			20160517					0%		

➕ Add row

Sum

				Round off	
VAT	VAT base	VAT amount		Sum rows:	
				Sum supplement:	0
				Sum excluding VAT:	0
				VAT:	0
				Round off:	0
				Sum:	

Invoice issuer

Name:	Flanagan Cleaning	Phone:		Plusgiro:		Boards site:	
Department:		E-mail:		BankGiro:	123-123	Org nr:	123455
Street:		Fax:		Bank Account:		VAT no:	123455
Postal box:				IBAN:			
Building:				SWIFT/BIC:			
Zip city:	9922 Dublin						

✔ Save

Enter the required information in the header. Fields marked with a (*) are mandatory.
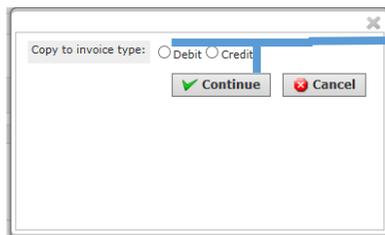
Enter the required information on the row. Additional rows are created when clicking on the ➕-sign

Save the invoice by clicking 'Save'. Once the invoice is saved, it is possible to send the invoice to the receiver by click on 'Send'.

4.1.1 Copy an existing invoice
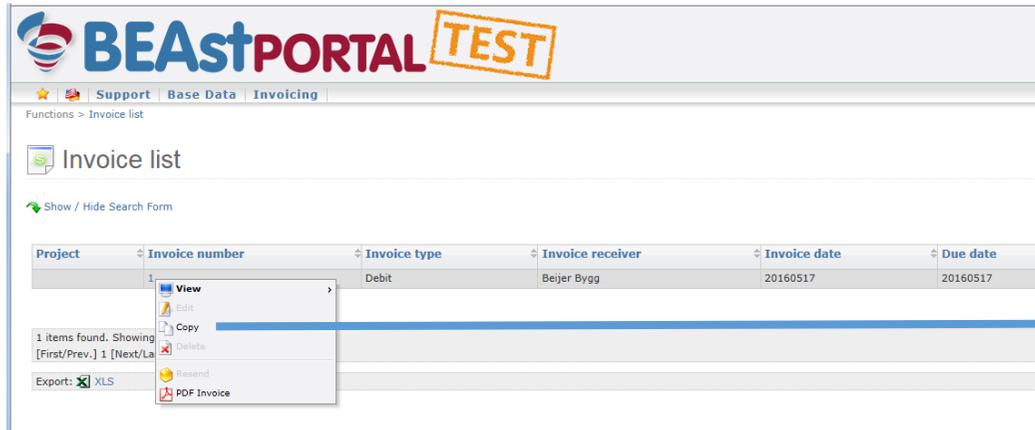
Select an invoice to be copied and right click. Choose 'Copy'.

On the pup up screen Select Debit or Credit followed by 'Continue'

Copy Debit to Debit

Head

Addresses

Invoicee
Invoicee
Name: Beijer Bygg

Buyer
Buyer
Name: Beijer Bygg

Delivery
Delivery
Address:

General

Invoice number:		Currency:	SEK (Svenska kronor)	Terms of payment:	30 dagar netto (30)	*
Invoice date:	20160517	Date of delivery:	20160517	Due date:	20160517	
Sellers order no:		Sellers ref/contact/name:	Jim	Dispatch no:		
Buyers call no:		Buyers ref/contact/name:	Ben	Buyer ph:		
Freight cost:	0	Other costs:	0	Discount:	0	
Message:						
Project:						
Activity:						
Resource account:						

Attachments

Bläddra...
Files (maximum 10):

Rows

Row	Item number	Item description	Del. dte	Ord. qty	Invoiced qty	A-price	Unit	VAT	Discount per unit	Sum
	Test	Test Item	20160517	1	1	100	EA (Each)	25%		100

Add row

Sum

Round off

VAT	VAT base	VAT amount
25%	100	25
	0	0
	0	0
	0	0

Sum rows:	100
Sum supplement:	0
Sum excluding VAT:	100
VAT:	25
Round off:	0
Sum:	125

Invoice issuer

Name:	Flanagan Cleaning	Phone:	Plusgiro:	Boards site:	
Department:		E-mail:	BankGiro: 123-123	Org nr:	123455
Street:		Fax:	Bank Account:	VAT no:	123455
Postal box:			IBAN:		
Building:			SWIFT/BIC:		
Zip city:	9922 Dublin				

Save

Start to enter a new invoice number. Make changes to the defaulted values and confirm your entries with 'Save'.

Once the invoice is saved the Send button appears and it is possible to send the invoice to the receiver by clicking 'Send'.

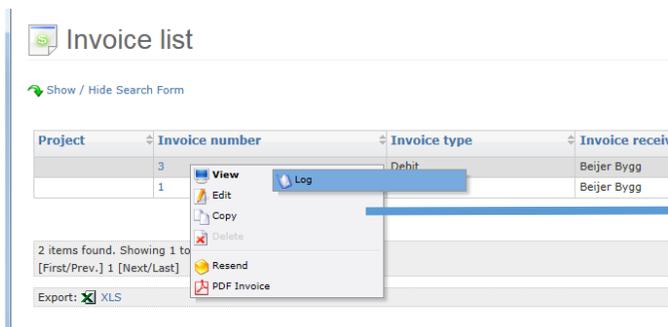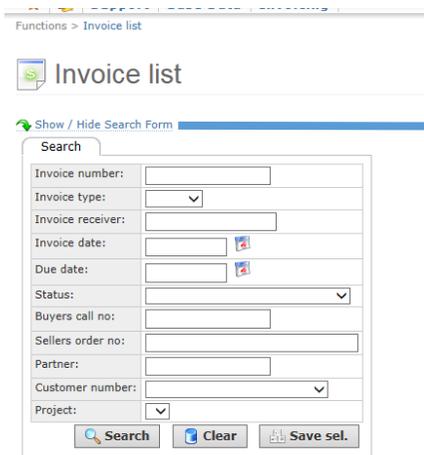## 4.2   Status of invoices

A green checkbox confirms that the invoice is send. Further status comments are displayed when you drag the mouse pointer over the status icon.

5   Additional functions

5.1   Submenus and selections

Right click on a row displays a submenu with additional functions.

Show/Hide allows you to add selections in order to limit the displayed result. Multiple fields can be used at the same time in order to narrow down to the desired selection.

5.2   Add users

Base Data | **Invoicing**
- Company related
  - Company
  - Consignors
  - Users
  - Authority profiles
- Customer related
- Item related
- General

Add users by clicking on 'Users'.

User	Name	Authority profile	Main user
FCLEAN	Fiona Flanagan	Maximum authority profile	X

1 items found. Showing 1 to 1.
[First/Prev.] 1 [Next/Last]

Export: XLS

☐ Add

Add User

User

User
- Username: _____ *
- Name: _____ *
- Mail: _____ *
- Phone: _____
- SMS: _____
- ID06: _____
- Authority profile: [Choose One ▾] *

Settings
- Date format: [Choose One ▾]
- Date separator: [Choose One ▾]

Consignor
- Consignor: [_____ ▾]

Deactivate
- Deactivated: ☐

✔ Save

Continue with clicking on 'Add'. Enter the user information. Fields marked with a (*) are mandatory. Confirm your entries with "Save".
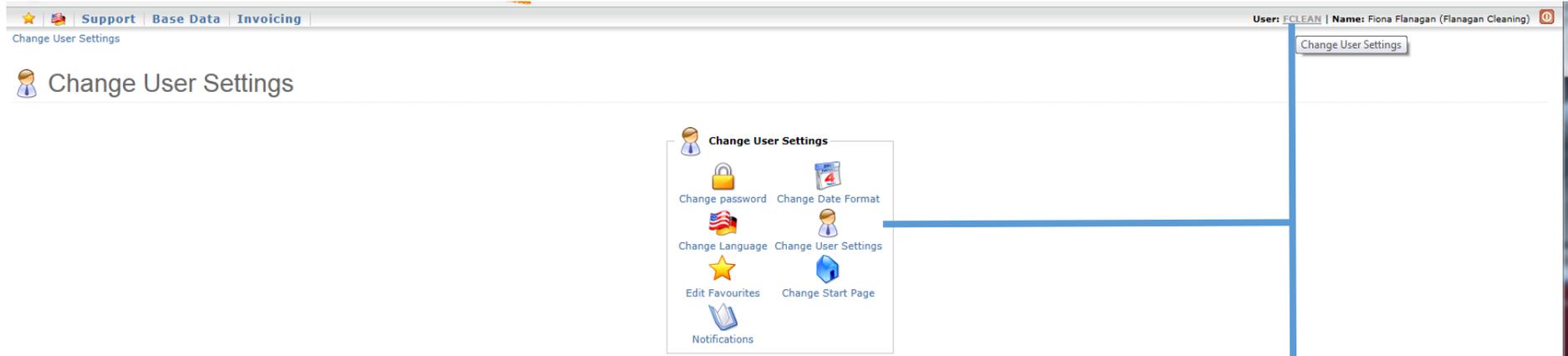
5.3 User settings

The user settings menu appears after selecting your user id next to the 'User:' field.

5.3.1   Change password

From the change user settings view choose 'Change password'. In the next view enter the old and new password. Confirm your entries with 'Change password'
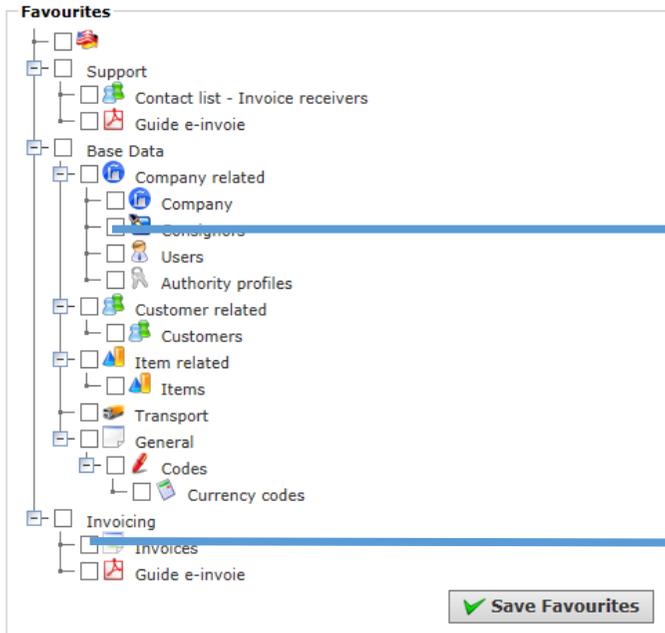
5.3.2   Change start page

From the change user settings view choose 'Change start page'. In the new view you can mark the desired start page. Confirm your entry with 'Save start page'. Next time when you sign on in the portal the selected page is initially displayed.

5.3.3   Favourites

From the change user settings view choose 'Edit favourites'. Mark any views that are frequently used.
Confirm your settings with 'Save Favourites'.
Once saved the favourite views appear under the ⭐-symbol.

5.3.4   Notifications

From the change user settings view, choose 'Notifications'.
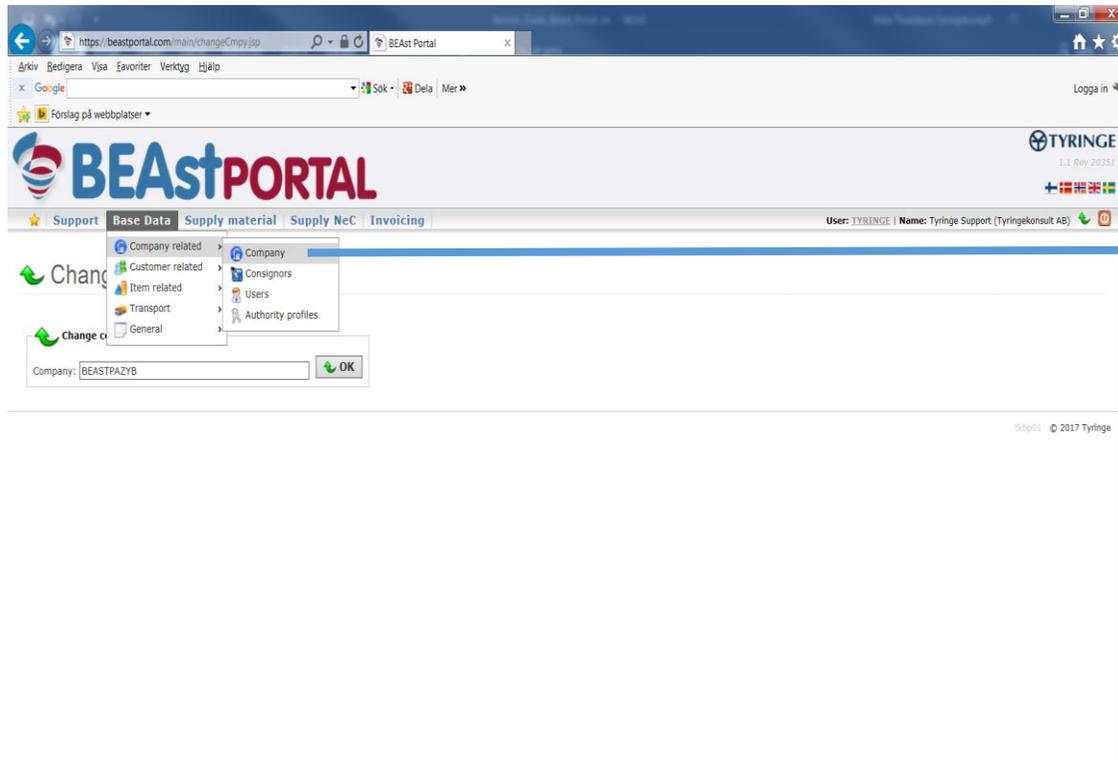If you want a notification by email of a sent invoice, mark the checkbox 'Always'

Notifications

Event	Notify	Notify by	Language	Last notified	Time
Sending invoice	☑ Always	Email ☑	○ Swedish ◉ English		

Export: 🗙 XLS

5.4   Company settings

5.4.1   Change bank information

From 'Base Data / Company related ' – options, choose 'Company'

Continue with clicking on 'To company adiminstration'.

Administrate company Tyringekonsult AB, 5561244962   Manual user

Company | **Administrators**

Name & Address

Name:	Tyringekonsult AB *
Department:	
Street:	Industrigatan 2
Postal box:	Box 134
Building:	
ZIP Code:	282 23 *
City:	Tyringe *
Country:	SE (Sweden) *

Identities

Organisation number:	5561244962 *
VAT no:	SE556124496201 *
Has F Tax Certificate?:	Yes *
GLN:	0
Account no:	
Group Account no:	
Peppol ID:	

Other

BEAst member:	No *
Annual turnover, millions:	0 *
Currency:	SEK (Svenska kronor) *

Invoicing

Invoicing method	*
Email address for PDF invoice:	*

Cost (SEK)

Start up cost:	0
Monthly cost:	0

Select which parts of the portal to sign up for

Provider of contstruction services: ☐
  I accept the terms: ☐

Supplier of material: ☐
  TA functions: ☐
  I accept the terms: ☐

Buyer of construction services: ☐
  I accept the terms: ☐

Buyer of material: ☐
  TA functions: ☐
  I accept the terms: ☐

Select which parts of the invoice portal to sign up for

Invoice issuer: ☑
  I accept the terms: ☑

Scroll down to the end of page and continue with clicking on 'Addresses And Financial info'.

🔄 Refresh   ✏ Edit   ◀ Back

📇 Addresses And Financial info

Payment receiver

Name:	Tyringekonsult AB *
Department:	
Street:	Industrigatan 2
Postal box:	Box 134
Building:	
ZIP Code:	282 23 *
City:	Tyringe *
Country:	SE (Sweden) *
Organisation number:	5561244962 *
VAT no:	SE556124496201 *
GLN:	0
Bank giro no:	99999999
Bank acc no:	
Postal giro no:	
IBAN:	
BIC:	

Refresh   Edit   Back

Deactivate

Save   Cancel

> Scroll down to the end of page and continue with clicking on 'Edit'.
> Change Bank giro no , Bank acc no, Postal giro no, IBAN or BIC.
> Confirm any changes with the "Save" button
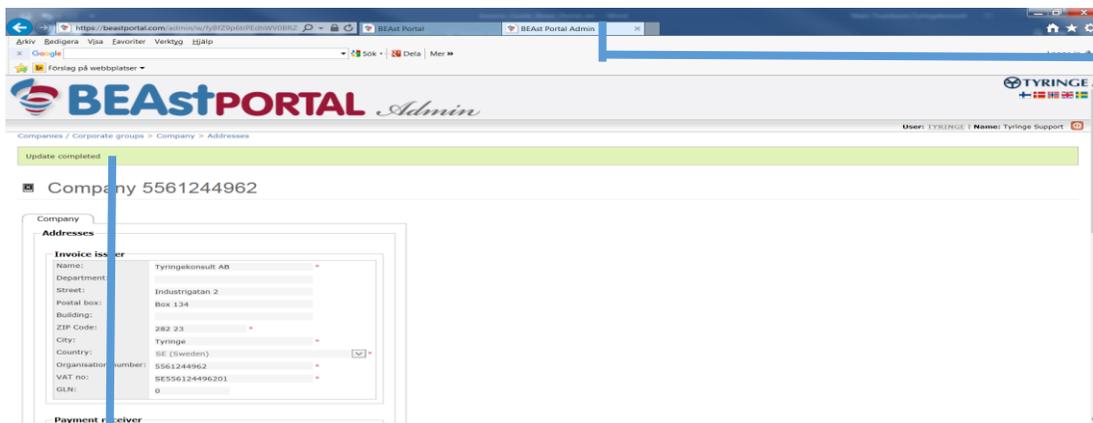
End session 'BEAst Portal Admin' by closing this window and you will automatically return to "BEAst Portal".

Information 'Update completed"