

Web-EDI Portal tradeIT

User Manual

2.4.47



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Chapter 1 Introduction



tradeIT is a web EDI platform. It enables you to exchange EDI business messages with your customers.

tradeIT is a web-based software that runs completely inside your browser, from every computer – without installation. No further ERP-software or interface integration is required. Messages will be displayed over the tradeIT web interface and communication is handled via the eXite® EDI-platform using secure connections.

tradelT supports the following EDI workflow. Each of the following steps is optional and can be customized to the needs of you and your business partners.

- Receiving Orders
- Sending Order Responses
- Sending Despatch Advices
- Receiving Receiving Advices
- Sending Product Data Updates
- · Sending Invoices

1.1 Requirements

Technical Requirements

tradeIT works with any current web browser that has cookies and JavaScript enabled. It has been tested with current versions of Internet Explorer, Firefox, Opera, Chrome and Safari. Besides this, no special requirements or installations are necessary.

Product Identification

In tradeIT products are identified by **Global Trade Item Numbers** (GTINs, formerly EANs), which you need to assign to your products and are transmitted to and from your business partner. The assignments between GTIN and product is done in the product master data.

1.2 Workflow

The following will briefly outline the communication of a complete business process with your business partner. It is possible and also common to skip some of these steps, depending on the agreements with your partner.

- You create and maintain your product master data.
- Your partner sends an order.
- You send an order response message, indicate if you're able to fulfill the order.
- You send a despatch advice and deliver the ordered goods.
- Your partner returns an receiving advice, static which goods he has received.
- You send an electronic invoice (plus a paper invoice at the end of the month, depending on



the legal status of invoicing in your country).

• You periodically (and automatically) synchronize your product master data with your customers.

1.3 Logging In

After registering for tradeIT, you will receive your username and password with which you can log into tradeIT.

To log on, open the tradelT website in your web browser.

http://www.tradeit.at/

After selecting the correct country, you should see a login screen similar to the following.

Product Contact Help Web Contact Help B A Contact Functionality TradeIT enables you to receive orders and respond with despatch advices. Further messages-types and features are currently in development. All messages are transmitted via the high-available <u>eXite@.eBusiness.platform</u> . Messages are processed without any delay. TradeIT is web-based and can be accessed using any recent web browser no installation required. Advantages Separate accounts for your employees Frequent improvements and adapton to new market-requirements Frequent improvement and the frequent improvement and the frequent improvement and the frequent improvement andition frequirement improvemente and the frequent improvement andi		Login User Password Auto-Login Auto-Login Login Login Login Logister Logister
TradeIT us easy-to-use WebService for exchanging electronic business messages with your business partners. Enctionality TradeT enables you to receive orders and respond with despatch advices. Further messages-types and features are currently advectionary. All messages are transmitted via the high-available <u>exitence.eBusiness.platform</u> . Messages are processed with your business partners. TradeT is web-based and can be accessed using any recent web browser no installation required. Advantage • Say electronic communication with your business partners • No configuration, except management of master data • Segue accounts for your employees • Fraguent improvements and adaption to new market-requirements. • Net_accounts for your partners for and adaption to new market-requirements. • Web add interface for use from any computer in your office	ie Product Contact Help 📰 🗕 🛚 🚍 🗕 🚍	
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TradeIT enables you to receive orders and respond with despatch advices. Further messages-types and features are currently in development. All messages are transmitted via the high-available <u>eXite@.eBusiness platform</u> . Messages are processed without any delay. TradeIT is web-based and can be accessed using any recent web browser no installation required. Advantages * Bacy electronic communication with your business partners * No configuration, except management of master data * Separate acounts for your employees * Requent improvements and adaption to new market-requirements * Web-based interface for use from any computer in your office	Functionality	
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Advantages Easy electronic communication with your business partners No configuration, except management of master data Separate accounts for your employees Separate accounts for your employees Frequent improvements and adaption to new market-requirements Frequent improvements and adaption to new market-requirements Web-based interface for use from any computer in your office	TradeIT is web-based and can be accessed using any recent web browser no installation requi	ired.
	Advantages Easy electronic communication with your business partners No configuration, except management of master data Separate accounts for your employees Frequent improvements and adaption to new market-requirements Web-based interface for use from any computer in your office	

TradeIT login screen

After your registration you should have received a username and password which you can use to login.

You can later create additional users for colleagues. Further information can be found in chapter User Management.

1.4 Updating Master Data

Before starting to work with tradeIT you should verify that your company data is correct and insert product master data.

Company Data

During your registration, your account has been set up with your company data. Please verify this information before you start using tradelT, as this information will be used to identify you in business messages and printouts. Further information can be found in chapter Company



Data.

Home	Messages	Master Data	Configuration	Hel
Overviev	W 💭 Despatch Adv. 🛛 🌬 R	eceiving Adv. ៩ Invoice	Company C Users I Invoice data	
				overvie

Product Data

In your business communication through tradeIT products are identified by Global Trade Item Numbers (GTINs). GTINs and additional data in maintained in the master data. You should keep your product master data up to date so that tradeIT can display relevant information in incoming messages and automatically use your master data for creating outgoing messages like despatch advices and invoices. Further information can be found in chapter Master Data.



Chapter 2 User Interface



2.1 General

The next chapter gives you an overview of the tradeIT menus and functionalities. All functionality can be reached through the main menu.

Home	Messages	Master Data	Configuration	Help
Overview	/ Source responses and the second se	Customers	Adv. 🖲 Invoices 😡	
1 1	1	The main menu	- ı ı	I

The available items in the menu vary depending on the configuration of your account. The following items can be available.

Home

- Home
- Problems

Messages

- Orders
- Order responses
- Despatch Advice
- Receiving Advice
- Invoice
- Product Updates

Master Data

- Customers
- Products

Configuration

- Company
- Users
- Invoice Data
- Accountings
- Number Ranges

Help

• Manual (access to this manual)



2.2 Home

The home screen gives an overview about new messages within tradeIT. The overview tables for the message types are reachable from the toolbar. Furthermore, news about tradeIT are displayed.

		TradelT Test Company 9012749856214 Mayerhorgasse 1 1040 Wien
⊣ome Messages Master Data	Configuration Help	San
Overview		
🗟 Orders 🖨 Despatch Adv. 🕼 Receiving Adv. 🖲 Invoid	e 0	
	Overview	
User Last Login	gs1test / St 18.06.2009 (tefan Kögi 07:59
New Orders New Receiving Advices	3 0	
New Problem Reports	1	
	News	
News		
Orders, Despatch Advices and Invoices are now availables. Furth	er message-types will be enabled soon.	
Such improvements will be announced here.		

The Start Screen

2.3 Problem Reports

When an error regarding data transmission occurs, information about this problem is saved in a problem report. This allows later analysis of the error by the Editel support.

Problem	Report			
🔍 Search	ᇢ Delete 🔞			
	Date	 Description 		
E 🍐	07.11.2012 13:13	Sending Product Data '75' failed		9
E 🍐	31.10.2012 13:13	Sending Product Data '73' failed		9
E 🎂	17.10.2012 13:13	Sending Product Data '71' failed		9
E 🍐	10.10.2012 13:13	Sending Product Data '70' failed		9
•	03.10.2012 13:13	Sending Product Data '69' failed		٢
	1 - 5 of 96	> >>	5 🚽 Lines	Filter new 🗸

The list of problem reports

Once a problem has been resolved, problem reports can be deleted.



Chapter 3 Messages



3.1 General

The following message types are currently available in tradeIT

- Orders
- Order responses are used to acknowledge if ordered products are available and can be delivered, but before preparations for delivery begin.
- **Despatch** advices are the digital equivalents to despatch notes and inform the buyer that his goods have been shipped
- **Receiving Advices** inform you when you customer has received the goods, and if all of them have arrived in good condition.
- Invoices
- **Product Data Updates** are used to transmit changes to product data, such as prices, to customers.

Home	Messages	Master Dat	a Co	onfiguration	n Help
Overview	Corders Corder responses Corder responses Corder Adv. Receiving Adv.	1	Receiving Adv.	E Invoices	•
User Last Logi	Invoices Product Updates				

Accessing message overviews from the menu

3.1.1 Message Status

Each message is assigned with a status indicating the progress of its processing. You can filter messages according to those status.

- Incoming messages, such as orders and receiving advices, are new at arrival. Once they have been opened by one of your users, they change their status to read.
- Outgoing messages, such as despatch advices and invoices, are created with status new and change their status to sent after successful transmission to your business partner.



32918649	08.10.2007	17.10.2007		-
33722576	08.10.2007	17.10.2007		-
Lines 🔢 🔽	Filter _{read}		🔍 🚊	i 🛤 (🕄
	new read	us a d		
	new, archi all	ived		

Selecting the filter from a message overview

3.1.2 Archiving Messages

When messages have been handled and you no longer need to work with them, you can archive them. This allows you to remove old messages without permanently deleting them.

Before further processing archived messages, you'll have to un-archive them.

Head	Positions
Order 33510891	I
👔 潯 Archive 🗎	0
The Archive button is fou	nd in the Message Toolbar
Head	Positions
Head Order 33510891	Positions
Head Order 33510891	Positions

3.1.3 Searching for Messages

At each message overview page, you'll find a search button, that allows you to search for messages. Depending on the type of message you are searching for, different search criteria are available.

For every type, the criteria customer, number and date are available.



Enter Search Criteria 🛛 💈		
Customer		
Order Number		
Order Date		
Delivery Date		
🔍 Search	😫 Cancel	
,,	Searching for Orde	rs

After clicking the search button, the entered search criteria are activated, and the message overview shows only matching messages. Use the "Show all" button in the toolbar to disable the search criteria and show all messages again.

	Orders r	new, read	
	🔍 Search	X Show all	Ę
Af "Sl	ter disabling th how all" button displaye	he search with th , all messages ar ed again.	ie re

If not all messages are displayed after disabling the search, a status filter could still be active. See chapter Message Status for further information.

3.1.4 Printing Messages

Each message can be printed by clicking on the printer icon. A PDF file is then created and opened, which can then be printed or stored locally.

Print

It is also possible to print multiple messages at once. Select all messages you want to print
from the list and click on the print icon in the toolbar. One PDF containing all selected
messages is created.

Your company's name and address is included from the master data. Please refer to chapter Company Data on how to update this data.

3.1.5 EDIFACT Export

For each received or sent message an export link is available. This link will open the EDIFACT message that was used to transmit and display the message.



Order mantis-3650							
👔 📮 Despatch Advic	e ፪ Invoice 🛯 👼 Archive						
	Order						
Number	mantis-3650						
Date	12.09.2012						
Delivery Date	14.09.2012 00:00						
Pickup Date							
Earl. Delivery Date							
Lat. Delivery Date							
Campaign Number							
Currency							
Interchange Control							
Reference	00303986000008						
		J					
Sender	<u>990000003609</u>						

Access the EDIFACT contents from the marked link

The link is not available for outgoing messages that have not yet been sent.

3.1.6 Clone Messages

Each outgoing message (order response, despatch advice, invoice) can be cloned. This creates an exact copy of the message which is assigned a new number.

This functionality can be used to regularly send messages that do not originate from another messages (for example invoices without a corresponding electronic order).

3.1.7 Sending Messages

All outgoing messages contain a Check or Send button. The check button is shown while the message is not yet complete, for example if mandatory information is missing. Clicking the Check button will provide a list of missing or incomplete information.

n	Check 🗄
	410
	Check button

Once all required information has been provided, the Check button is replaced by a Send button. Clicking the Send button will send the message to your business partner. After a message has been sent it can no longer be modified. A sent message can be cloned in order to modify and resend it.

n	Send E
	ساہ Send button

For sent messages, the Send button is replaced by a Send Copy button. This button allows to re-send an exact copy of the message.





3.2 Orders

Incoming orders from your customers will be displayed in Messages - Orders.

Jrders read									
🔍 Search 👒 Archive 🚔 Print 😡									
-	Buyer	Delivery Add.	Order Number	Date	- Delivery Date				
	Praktiker Outlet	Praktiker Outlet	32918649	12.06.2009	30.06.2009		B		
	Metro	Metro	428426	20.07.2009	25.06.2009	8	-		
	Tesco Store		564654648	12.06.2009	25.06.2009		-		
	Metro		428425	12.06.2009	22.06.2009		-		
	Metro	Metro	428424	10.06.2009	20.06.2009	۵	-		
	Tesco Store	Tesco Store	metro-tr-maximal	12.06.2009	25.06.2006		-		
1 -	6 of 6		Lines 10 🗸	Filter rea	ad 🔽	- 🔍 🚊	🔉 📀		

You can select the type of displayed messages by scrolling to the bottom of the page and selecting if you want to see all messages, just the new (not yet opened) messages, already read or archived messages. Once you opened a message, it will no longer be shown as new, but as read. More information about message status can be found in the Message Status chapter.

You can print new orders or directly create a despatch advice out of them. Once you opened them and they are marked as read, you can also archive them directly in the orders overview.

3.2.1 Contents

When you open an order, the head information is displayed. The actual information depends on the message format that is used by the sender, but basically contains

- order number
- order date
- buyer
- sender
- delivery place
- delivery date and time



Head	Positions	
Exceptional Or	der gastro-maximal	
👔 💭 Despatch Adv	vice 😝 Archive 🚔 🎯	
	Exceptional Order	Supplier
Order number Date Delivery date Earl. Delivery Date Lat. Delivery Date Interchange Control Reference Sender	gastro-maximal 14 08 2008 01 09 2008 05 09 2008 1 9900000000301 Miscellaneous	9012749856214 TradelT Test Company Mayerhofgasse 1 1040 Wien ATU16113300 Buyer 990000000301 Gastro-Test
Additional Info	TEXT	Delivery Point
		<u>9900000000301</u> Gastro-Test
		Ordered by 990000000001 Gastro-Test
		Invoicee 3900000000000 Gastro-Test ANSPRECHPARTNER

Order Detail

Using the Positions tab you can access the individual items of the order.

Position Data

Each order message contains one or more ordered products which are listed in the positions view. For each product, the quantity and further data is contained in the message.

💭 Desp	Positions Order 64926890 atch Advice 🖲 Invoice 📮 Archive 🔒 🥹		
lumber	Product	Internal Article Number/GTIN	Quantity
1	LUKANA CUKRARSKA 250G	8593841000190	4200
2	OMEGA 250 G	8593845564117	10880
3	CERES SOFT 450g	8593845564421	1404
4	OMEGA FRIT 2.5KG	8593845564148	68
5	ALFA VITAL 500G	8593845563851	900
6	ALFA OPTIMA 500G	8593845560560	1236
7	BIANKA FIT 500g	8593845561161	408
8	DIANA LIGHT 500g	8593845560553	816
9	ALFA SLANA 400g	8593845561567	276
10	STELLA 250g+20% ZDARMA 300g	8593845561185	28640

Positions Overview

If the product master data is not complete, a screen will be shown when you try to open the position page. This gives you the chance to fill in the missing product data.

3.2.2 Email Notification

tradelT receives incoming orders and makes them available online immediately. If you wish to be notified when a new order has been received, it is possible to configure email notifications and forwarding. Refer to chapter Email Notification for further information.



3.3 Order Responses

Order response messages are used to inform if its related order can be supplied completely, or if some products can be replaced by other products.

Creating an order response

Order response messages are typically created from an incoming order using the corresponding button in the toolbar.

	Order mantis-3424							
👔 📮 Despatch Ad	vice 🥃 Invoice	🛃 Order response	潯 Archive		0			

An order response message is created using the button in the toolbar

The created order response message is automatically filled with the contents of the order message.

All data can be adapted to reflect the availability of products, for example:

- Positions can be removed if they can not be delivered.
- The quantities can be adapted to reflect the amount that will actually be delivered.
- Additional products can be added, for example if a different product will be replaced.

It is also possible to create an empty order response message using the New button in the toolbar of the order response overview. In this case all data needs to be manually entered.



3.4 Despatch Advice

A despatch advice confirms the delivery of products and is the electronic counterpart of a delivery note.

Please note, that the available input fields depend on the message format that is used by your business partner.

Creating a Despatch Advice

A despatch advice can be created from an existing order or order response by opening the message and clicking on the Despatch Advice button. If the button is not shown, you have to enable despatch advices in the master data first. Please see chapter Message Properties for further details.

The created despatch advice is automatically filled with the contents of the order or order response message.



It is also possible to create an empty despatch advice using the New button in the toolbar of the despatch advice overview. In this case all data needs to be manually entered.

If the required company is not shown in the list, despatch advices have to be enabled first. Please see chapter Message Properties for further details.

3.4.1 Contents

The actual information depends on the message format that is used by the sender, but basically contains

- · despatch advice and delivery note number
- despatch advice and delivery date
- · delivery location

Head	Shipping	Positions	
Despatch Advice 52	2		
1 Send Copy 🗅 Clor	ne 🗟 Archive 🖲 In	ivoice 🔒 😡	
	Despatch Advid	e	Supplier
Number	52		9012749856214
Date	18.09.2	012	TradeIT Test Company
Delivery Date	30.05.2	006	Mayerhofgasse
Time	16:00		AT 1040 Wien
Interchange Control Refer	ence <u>134795</u>	43023488	Buver
Recipient	990000	0000202	
			990000000202
	References		ECR97-lest
Order Number	ecr97-m	naximal	AT 1845 Vienna
Date	08.05.2	006	
Delivery Note Number	52		Balling Balat
Date			Delivery Point
Supplier Order Number			990000000202
Date			ECR97-Test
bute			Demo-Street
	Transportation	1	AT 1845 Vienna
Туре	Inland water transpo	ort 👻	Ultimate Consignee
Means	Truck + crane f. liftin	g goods wo. trailer 🛛 👻	880000000202
			ECR97-Test
			Demo-Street
			AT 1845 Vienna
			Ordered by
			99000000202
			ECR97-Test
			Demo-Street

The head section of a despatch advice

Numbering

When using the Number Ranges feature, which is described in chapter Number Ranges, newly created despatch advices are automatically numbered by tradeIT. These numbers are incremented from one and can be manually adjusted.

Position Data

The Positions tab contains a list of all products that will be delivered. You have the possibility to change quantities and to add and remove items.



3.4.2 Shipping Data

Shipping Details can be created in tab Shipping. Use the New button to add packages and fill out the type of transport package and quantities.

Shipping Despatch Advice 57						
Cuantity Type 10 1/1 EURO Pallet 6 1/2 EURO Pallet 1-2 of 2 € €	Immensions Total Weight: 10 kg Total Volume: 5 inf					
 sscc 123465789123467789 	Pack. Type Quantity Handling					
1 - 1 of 1	🕏 😝 🔞					

The shipping information contains data about packages and dimensions.

SSCCs

By using SSCCs you can specify which shipping containers will be used for the delivery, and which products can be found on/in which of the containers.

After specifying the list of shipping containers (SSCCs), the positions need to be assigned to the containers they are delivered in.

3.5 Receiving Advice

A receiving advice can be sent by your customers to inform you about arrived goods. It can contain the date and time of arrival as well as a list of arrived goods.

Depending on your business partner, a receiving advice can also state differences to the original order, in the case that goods were missing or have been damaged during the transportation.

1 🖲 Invoice 🛛 🙀 Archiv	re 🔒 🧕	
	Receiving Advice	Supplier
Dispatch adv. number	SD545458	9012749856214
Date	28.07.2009 08:38	54215
Delivery date	02.08.2009	TradelT Test Company
Payment date	03.08.2009	Mayerhofgasse 1
		1040
Order number	on	Wien
PO date	05.08.2009	1234
Despatch note number	45442	B
Despatch note date	04.08.2009	Buyer
Stamn	cr	8594031899983
loventon/ renort	46545	Tesco Store
Vatid	5462545	Demo Street
Vabu	3482343	1234
Interchange Control		Ort
Reference	1	
		Delivery Point
Sender	9002233430181	0504024000002
		8034031833383 Tassa Stara
	Transportation	Domo Street

A Receiving Advice

The list of Receiving advices can be found at Messages - Receiving Adv.



3.6 Invoice

Electronic invoices are used to replace classical paper invoices. Please note, that the available input fields depend on the message format that is used by your business partner.

Invoice 102			
👔 🖾 Send Copy 🛅 Clone 🕞 Are	chive 🚔 😣		
	nvoice		Supplier
Number	102		9012749856214
Date	11.03.2010		TradeIT Test Company
Delivery Date	25.03.2010		Mayerhofgasse
Currency	Euro 👻		AT 1040 Wien
Value Date	·		1234
Interchange Control Reference	<u>12694239191387</u>		Buyer
Recipient	9000480000003		990000002602
Re	ferences		Metro-AT-Test
	lerendes		
Order Number	mantis-1672		AT
Date	09.03.2010		
Delivery Note Number	asdf		Delivery Point
Date			990000002602
Invoice Number			Metro-AT-Test
Date			
			AT
Payr	nent Terms		
Net Payment	Dave		
Date		_	
Discount 1	Days	%	
Discount 2	Days	%	

Creating an Invoice

An invoice can be created from one of the previous messages (order, order response, despatch advice, receiving advice) using the Invoice button. In these cases, the new invoice will contain all available data from the originating message. If the invoice button is missing in the message, invoices need to be enabled for the customer. See section Message Properties for further information.

It is also possible to create an empty invoice using the New button in the toolbar of the invoice advice overview. In this case all data needs to be manually entered.

If the required company is not shown in the list, invoices have to be enabled first. Please see chapter Message Properties for further details.

3.6.1 Contents

The data of the invoice depends on the format that is used for exchange with the business partner. A typical invoice contains

- invoice date and number
- a reference to the order
- the invoiced goods and their quantities



• the invoice total

Position Data

The tab Positions gives you the possibility to change quantities. If you create an invoices from scratch, you can add products out of your product master data. Invoices generated from an existing order automatically contain all positions from the order. New positions can be added using the +Position button.

Totals

The Totals tab sums up the positions' values and shows the total invoiced amount.

Numbering

When using the Number Ranges feature, which is described in chapter Number Ranges, newly created invoices are automatically numbered by tradeIT. These numbers are incremented from one and can be manually adjusted.

3.6.2 Sending Invoices

When all mandatory fields of an invoice are filled out, the message is ready to be sent. This is indicated by the Check button being replaced by the Send button.

The message is transferred through the B2B-Platform eXite® to your business partner. After successfully sending the invoice, it can't be edited or deleted.

Resending Invoices

When a sent invoice is lost at the recipients side, it is possible to resend it. The former Send button is then labeled as Send Copy and will sent a exact copy of the message, that has internally been labeled as a duplicate.

	Invoice 99						
	î	🙀 Send Copy	Clone	潯 Archive		0	
U	se the	e Send Copy buttor	n to send a co	py of an already	/ sent i	invoice	a

3.6.3 Collective Invoices

tradeIT enables you to sum up your sent invoices in a collective invoice.

	Collective invoice	8
Corporation	Tesco HU	<u>~</u>
Period	05.2009	_
Number	23	
🤹 Accept	🙁 Cancel	

Creating a Collective Invoice for Mai 2009

For creating a collective invoice, chose the recipient of the invoices. Following this, enter the time period from which invoices should be included. You can enter full months as 12.2008 for



December 2009 or more specific periods like 1.12.2008 – 15.1.2009. The collective invoice does not include archived invoices. You can use this to explicitly exclude messages from the collection invoice, for example when an invoice has been sent twice. See chapter Archiving Messages for archiving and un-archiving messages.

Depending on local tax laws, collective invoices may be required in addition to electronic invoices.

3.6.4 Correcting Invoices

tradeIT offers different means to correct an invoice after it has been sent. They work by sending a special invoice, which describes the changes to the original one. The availability of the function depends on the message property settings of the customer (chapter Message Properties), which reflect their ability to process these messages.

Storno Invoices

If you need to completely cancel an invoice which you have already sent, open the invoice and click on the Storno Invoice button.

This will automatically create a storno invoice that is used to cancel the previously sent invoice. The number of the wrong messages is automatically filled in for the storno invoice, so that your business partner can link the two messages

After sending the storno invoice, both messages will show up in your sent invoices for reference purposes.

Correction Invoices

Click on the Correction Invoice button to create a new correction invoice.

The correction invoice contains all position of the original invoice twice. The first entry with negative values, that refers to the original amount and price in the incorrect message. The second entry automatically contains the same amount, and price, but can be changed by you.

If you need to cancel a single position from an invoice, delete its entry with positive value.

For positions that don't need to be updated with the correction invoice, don't change or remove its entry with positive values. Each unchanged position will then not be included in the final correction invoice.

3.7 Product Updates

Product Updates are used to transmit changes about product information to your business partners. Product updates can be sent on a regular basis using a scheduler, or on demand, for example when requested by your customer.



3.7.1 Contents

tradeIT allows you to manage the following data about your products

General

- Description: the name of the product
- GTIN: the Global Trade Item Number assigned to the product
- Internal Article Number: the number that is used internally to identify the product
- Price: the price of the product
- Price Base: the number of items for which the above price is valid
- Unit: the measurement unit in which amounts of this product are given
- VAT: the VAT rate applicable for this product

Prices

This section is used to specify prices that are only valid for certain customers.

- Buyer Number: The number of the product that the customer uses to identify the product
- Price: the price for this product when sold to this specific customer
- VAT: the VAT rate that is applicable for this customer.
- Customer: the customer for which the special price is applicable

Customer-specific

This section is used to create product updates that can be sent to customers. Further information on this topic can be found in section 4.6 Product Updates on page 20.

Texts

- Short Description: this is the product text from the General tab
- Long Description: a more detailed description that can include measurement data
- · Receipt Text: the text that should be used when printing receipts
- Brand Name: the brand name of the product
- Marketing Name: the marketing name of the product

Additional Data

- Returnable Item: indicates if the product is a returnable item, such as a container
- Variable Quantity: indicates if the product is billed based on actual delivered weight
- Organic Product: indicates if the product is organic
- Require Advance Order: indicates if the product requires advanced order
- Dispatch Unit: indicates if this product can be delivered, or if only smaller/larger packages can be



 Invoice Unit: indicates if this product can be invoiced, or if only smaller/larger packages can be

3.7.2 Creating Product Updates

Product Updates are created automatically for each new product in the product master data. When you open a product to edit it, you'll see a list of price catalogues. You can use the + button to manually add a price catalogue.

First you need to specify which business partner the price catalogue should be sent to.

After that, the product data screen is shown, in which you can enter all data that should be transmitted.

If you need multiple product data updates for one business partner, you can copy an existing one. You'll find the button to do this in the list at the right side.

	Pr	eiskatalog G	astro-Test			8
GTIN	123456784		Interne Artikelnummer	int-art-nr		
Int. Klassifikation			Ersetztes Produkt	Biljanka	*	
Aktion selbst festlegen	I 🗖		Aktion	geändert	~	
Liefereinheit			Fakturiereinheit			
Mengenvar. Artikel			Verpackungseinheit			
Bestellmengeneinheit			Basissortiment			
Bezeichnung	Pricat-Test-Produkt		Kurztext	kurz		
Kassenbon-Text	kassenbon-text		Markenname	markenname		
Marketingname	marketing		Mindestbestellmenge	12345	Stück	
Nettofüllmenge	12345	1 💌				
Gültig ab	28.10.2008					
verfügbar ab	19.10.2008 🕏		bis	23.10.2008 💆		
min. Lagerdauer (Tage)	20					
MWSt.	20 🔽 %	~		🗎 Verpackung		
Preise						
🗖 Тур	Preis	Mengen-Staf	ffel Gültigke	it nur für	Standort	
Netto	124	1 - 123		46465	46865164	0
Brutto	1234	von 232	15.10.2008 - 25	.10.2008 Fili	ale xy	0
1 bis 2 v	von 2				0 😑	0
Abgaben/Steuern						
Art			Rate	Betrag		
Getränke	steuer		123,00			0
Abgaben a	uf Tabak			123		0
					٢	0
🔹 Übernehmen 🛛 🌔	Abbrechen					

Modifying data for a product update

In the price catalogue screen you can enter the data that should be transmitted to your business partner. GTIN, name and price of the product are automatically displayed from the regular master data.

Additionally you can specify, from which time the pricat is valid and the products status.

Activating Product Updates

As it it possible to create multiple Product Updates for the same product and customer, regular sending must decide which Update to send. This is done by activating updates. The first update for a customer is automatically activated. Activated Updates are indicated by an orange icon next to the customer logo.



		Customer
🗖 a	Andert	Andert/Billa
	An activated product	update.

3.7.3 Sending Product Updates

Manually Sending Updates

You can send a price catalogue by clicking on the Send button in the list. You will be notified if the document doesn't contain all necessary information. In this case, you will need to update it with the necessary data.

To send updates for a product to all recipients, click on the Send button at the very right of a product in your master data. All active updates that are configured in the product configuration will be sent immediately.



To send updates to selected customers only, open the Customer tab of the product. You can then click on the Send icon for each customer you want to send an update.

This method of sending can also be used to send Updates that are currently not active.

Net Price	Effective Date	
12.00	04.11.2009	🖂 🔓 🥥
12.00	04.11.2009	Send 🤤 🧭

Sending Regular Updates

You can configure tradeIT to send regular product updates. Open the settings for the customer which should receive the updates. At the bottom of the settings page, you'll find the scheduler list to which you can add entries.

For each entry you can chose to transmit all, or just changed product data, as well as the intervals. When enabled, tradeIT will automatically send all product updates for the scheduler entry.

If multiple product data sets are configured for the customer, only the active one is sent.



	Create/N	lodify Cor	ooration Data	_	_	8
Name	Gastro-Test					
Logo	defaultLogo.gif	~	🔹 🧖 Upload			
Currency	Euro 💌					
Default vat	0 💌					
My supplier number						
Incomming Messages:	.n 🗆					
Use product price						
Product Data Updates Scheduler	Send 🔤					
🗖 Ena 🛛 Type	Name	Min	Hour	Days	Month	Weekdays
Empty	List					• • •
Save Sance	el 🥜 Properties					

Sent Product Updates

A list of sent Product Updates can be reached via the menu Messages – Product Updates. The list includes sent Product Updates and those that you tried to send but failed with an error.

The list can be searched and filtered as any other message overview.



Chapter 4 Master Data



4.1 Introduction

Master Data contains information about your products and your business partner.

- Customer contains GLNs, address information and communication settings about your business partners. The data is centrally managed by Editel, but can be adapted if needed.
- Product master data contains data about your products, which is used for outgoing messages, printing and product updates.

4.2 Customers

The customer master data contains the following information about each of your customers

- · Name and address
- A list of locations and their GLNs
- Communication parameters

This data is centrally managed by Editel and is imported into your account as needed. All imported data can be adapted if required.

4.2.1 Importing Common Data

tradeIT contains a centrally managed set of customer master data, which is updated automatically. All data is imported into your account on demand, for example when an order is received for a new store.

To manually import some customer data use the Import button in the customer master data section.



This will import the current master data for the selected customer and all of its locations into your account. You are free to modify the data if you wish, but this should generally not be necessary.

4.2.2 Creating Customers

If a customer is not available through the import function, you can enter its data manually.

Contact your customer first to clarify which EDI formats are used. After selecting the format, add the company details, select the currency and a logo.

After saving the customer you should enter all relevant locations (eg delivery locations,



addresses of the buyer, invoice recipient, etc) using the Locations tab.

4.2.3 Locations

A location represents a physical address of a customer, that is either used for invoicing, delivery or other roles in the messages. If you already imported customers from the tradeIT master data, it should not be necessary to set up locations manually. Location master data is included in print views of messages.

New 🔍 Search 🤤 Delete 😣			
▲ Name	GLN / Store Number	ZIP	
BILLA Lager & Transport	900637000009		0
BML-Zentraleinkauf Langsamdreh	9006370270129		0
BML-Zentraleinkauf Schnelldreh	9006370430103	2355	0
BML-Zentraleinkauf Zentrallage	9006370400106	2355	0
1 - 4 of 4		Li	nes <mark>5 -</mark>
	New Q Search Delete Delete Name BILLA Lager & Transport BML-Zentraleinkauf Langsamdreh BML-Zentraleinkauf Schnelldreh BML-Zentraleinkauf Zentrallage 1-4 of 4	New Q Search C Delete C CLN / Store Number Name CLN / Store Number BiLLA Lager & Transport 900637000009 BML-Zentraleinkauf Langsamdreh 9006370430103 BML-Zentraleinkauf Schnelldreh 9006370430103 BML-Zentraleinkauf Zentrallage 9006370400106 	New Q Search O Delete Image: CLN / Store Number ZIP Image: Name GLN / Store Number ZIP BiLLA Lager & Transport 9006370000009 Store Number BML-Zentraleinkauf Langsamdreh 9006370270129 Store Number BML-Zentraleinkauf Schnelldreh 9006370430103 2355 BML-Zentraleinkauf Zentrallage 9006370400106 2355 Image: Store Number Store Number Store Number Image: Store Number 9006370400106 2355

List of locations for a customer.

Locations are identified by their GLN. If messages are received that contain an unknown GLN (that is not available in the master data and can not be imported from the central data), a new "unknown" entry i created. Complete all known fields to ensure that correct data is included in print views.

	Location	
Name	Demo-Location	
Short Name	Demo	
GLN	1234567890128	
Store Number		
Street	Demo Street 1	
Street Number		
ZIP	1010	
City	Vienna	
Phone Number	asdfasdf	
Country	Austria 👻	
VAT Id.	0456476456	
Commercial Reg. No.		
Service Provider		
Туре	Warehouse -	
Customer	test2 🗸	
	* • • • •	
V Save	Terror Save+Update	Cancel

Data for a location.

Importing Locations

When importing customer master data, all of its locations are automatically imported. If you need to import locations that have been added to the master data pool after your initial import, click on the Import button in the toolbar.

In the next section all of the locations are listed. Those already available in your master data are marked with an asterisks (*). If you chose to import such an location, your modifications are overwritten.



4.2.4 Communication Parameters

The tabs Incoming Messages and Outgoing Messages contain the communication parameters for a customer. The settings for a specific message type (such as Order and Invoice) are grouped together.

		Invoice
Format	ECR97	•
Mailbox	9001910000020	
Test		
Send product description		
Correction Invoice		
Credit Note		
Round sums to	4	
Round position amounts to	4	
Round position prices to	4	d
Send Message Class		
Replace Packages by Products	Disabled	-
Use Data from Message		

Communication parameters for Invoices.

Format

The format settings specify the message format that is used for each message type. For each type, a separate format can be specified. This setting must be mutually agreed on with your trading partner. tradeIT ships with appropriate default values, so changes should generally not be necessary.

Mailbox

The mailbox field is used to set the default recipient for the given message types. For invoices, this will overwrite the recipient given in the message. For Price Catalogues, this is currently the only way to define the recipient of the messages.

		Order
Format	ECR97	
Send EDIFACT-Acknowledgement		
Forward PDF		
Enable Email Notifications		
Email Notification after		hours
Email Notification Recipients		

Communication parameters for Orders

Email Notification

For incoming messages. This ensures, that you will be notified about incoming messages with you didn't read in time. Enter the number of hours, after which you will be notified about unread orders or 0 if you will be notified immediately.

In the field Email Notification Recipients you can specify who should receive notification emails. If you leave this empty, the email address from your administrator account will be used.



4.3 Products

The product master data contains information about your products, such as a description, and prices. Products are identified by their GTIN and the internal article number in business messages. The product master data relates those two numbers to all additional information.

Product Demo1	
1 🗄 Save 🌩 Convert to d	isplay 🔶 Convert to package 🔞
	General
Description	Demo1
GTIN	4015000011556
nternal Article Number	1234
Price	10.00
Price Base	1
Unit	Kilogral 🗸
VAT	10% 🔹

Basic information about a product.

4.3.1 Data

tradeIT can store various data about your products. The following section explains how they are used and which of them you will need for your use case.

General

- Description: a description of the product that is used throughout the application and in printouts
- GTIN: the Global Trade Item Number of the product
- Internal Article Number: the number that is used internally in your company to identify the product
- Price: the default net price for the product that can be overwritten for specific customers.
- Price Base: the amount for which the specified price is valid. A product that has price 50,-- and price base 10 costs 50,-- per 10 items
- Unit: the unit in which the product is measured
- VAT: the vat rate that is applied to the product

Prices

This section is used to specify special prices for your customers. The default price from the General section is applied for a customer if there is no special price.

- Buyer Number: the number that the buyer uses to identify the product
- · Price: the price that should be used for the customer
- VAT: the vat rate that should be applied to the product for the customer



• Corporation: the customer for which this price is valid

Customer-specific

This section is used to specify customer-specific product data. These are then sent, together with the regular product data as product updates. You will find further information in chapter 4.6 Product Updates starting on page 20.

Texts

- Short Description: a short description for the product; this always equals the product description from the General section
- Long Description: a more detailed description of the product which can contain measurements and ingredients, as needed
- PLU Text: a short text that is used for example on receipts;
- Brand Name: the brand name of the product
- Marketing Name: the marketing name which might also include package size

Additional Data

- · Returnable Item: indicates if the product is a returnable container
- Variable quantity; indicates if the product is invoiced in another measurement unit than it is ordered
- Organic Product: indicates if the product is organically grown
- Order Unit: indicates if the product can be ordered; if not, only smaller or larger units are shipped
- Advance Order: indicates if the product needs to be ordered in advance
- Dispatch Unit: indicates if the product can be shipped; if not, only smaller or larger units are shipped
- Invoice Unit: indicates if the product can be invoiced; if not, only smaller or larger units are invoiced

4.3.2 Displays / Groups of Products

You can also create a group of products and mix different products into packages with a different price than the single units and assign prices for each trading company by pressing the button Add Display at the right bottom of the page Products overview.

Once you entered all data of products your trading partners order from you, this information will be used in all incoming orders, outbound dispatch advices and invoices.



Gro 1	Group of Products Test-Display Image: Save with the second seco							
	GTIN/Internal Article Number	Description	Quantity					
	9000100482875	Demo5	4 🥥					
	4062800003496	Birnen	4 🤤					
	1234567890128/AB412-42	Beispiel-Produkt	4 🥥					
	1 - 3 of 5 > >>	×						

The products contained in a display.

4.3.3 Packages

Packages contain specific amounts of a single product. For each package the contained product and its amount has to be specified. The price is then calculated from this input.



Chapter 5 Configuration



5.1 Overview

This section describes tradeITs means of customizing the application to fit your needs.

- Company Data contains information about your company, such as the name, a logo and the address.
- Users lets you create new accounts for you employees so that they can work with that parts of the application they need.
- Invoice data contains about terms of payment which will be included in invoices that you send from tradeIT to your customers.
- Number Ranges configures how numbers are assigned to newly created despatch advices, product updates and invoices.

5.2 Company Data

Using this page, you can update your company data, such as name, address, VAT number and company logo. This information is used for printing messages and collective invoices.

Name	TradelT Test Company	
Shortname	TradelT TestCo	
GLN	9012749856214	
Street	Mayerhofgasse	
Street Number		
ZIP Code	1040	
City	Wien	
Phone Number		
Country	Austria 🔹	
VAT Id.	VAT	
Commercial Reg. No.		
Excise Licence Number		
Organic Labelling Number		
Logo	defaultLogo.gif 🔹	👰 Upload
Main User	Stefan Koegl 🔹	



5.3 User Management

When registering for tradeIT, you receive a username and password for you company's admin account.

Create/Edit User Data 🛛 😵			
Name	Mr. 💌		
Title	▼		
Name			
Email			
Login	?		
Password	? G		
Role	User 💌		
Ordore			
Read	Delete Archive		
Despatch.	Advices		
Read	🗌 Modify 🗌 Create 📃 Delete 🗌		
Archive	Send		
Invoices			
Read	🗌 Modify 🗌 Create 🗌 Delete 🗌		
Archive	Send 🗌		
Master da	ta customer		
Modify	Create Delete		
Master da Modifu			
Problems			
Delete			
Product D	ata Updates		
Read	🗌 Modify 🗌 Create 📄 Delete 🗌		
Archive	Send 🗌		
Save Cancel			
Save Cancel			

Settings for Creating a new User

All users of your company's account share the same data, but you can restrict access to some parts of them for some users.

After logging in with this account, you can create additional users and assign specific rights to them.

To configure your user accounts, go to Configuration – Users. The page displays a list of all your registered users. At the bottom of the list you'll find a button to create a new user.

The login field is the name that the newly created user can then use to log in to tradelT.

As the usernames are global to the system, use the ? button to check the availability of the username.

tradeIT enforces strong passwords. User the ? button beside the password field to check the strength of the password, or use the G button to create a secure password.

You can define a set of permissions for each user, that control what he is allowed to do within tradeIT.



5.4 Number Ranges

Each message is assigned with a number for identification. Incoming messages are numbered by your business partner, outgoing messages are numbered by you.

tradeIT can automatically assign subsequent numbers to each newly created messages.

You'll find one group of settings for each message type, each containing the same fields.

- Auto-Assign indicates if new messages should get a number assigned when they are created. This number can later be corrected or overwritten by you.
- These automatically assigned numbers start at the first number, advance by one for each newly created message and repeat after the last number. The field next number shows the number that will be assigned to the next number.
- The option Prefix Year indicates, if the current year should be prefixed to the assigned number.
- The Prefix field allows you to manually specify a prefix.
- The number of leading zeros formats the number to match the given length and fills all necessary digits with zeros.

5.5 Invoice Data

Some invoice formats allow you to include payment data, such as account and bank id within the message.

All information that is entered in the section Invoice Data will automatically be included in the message if the format of your business partner allows this.

5.6 Accountings

The accountings section provides access to your invoices for your tradeIT usage. Invoices are made available at the beginning of each month.

5.7 Signature

tradeIT provides the possibility to upload an own certificate, which can be used for signing outgoing invoices. To add such a certificate,

please consult the technical eXite® support, who will enable this special functionality. After this functionality is enabled, the certificate can

be imported in the configuration-menu, which is shown in the following figure:



Company	Upl	Upload Certificate	
Users	Certificate	Durchsuchen	
Invoice Data	Password		
S Accountings	🕅 Upload 🛛 🙁 Cancel		
Number Ranges			
😺 Signature			

Afterwards, you have the possibility to upload your own certificate using the import-button. The certificate has to be available at your local

computer before it can be uploaded. Furthermore it is necessary to enter the password, which is assigned for the keystore.

After the previously mentioned steps have successfully been completed, you find a new certificate entry in the overview table as shown in the

following figure:

Valid from	Valid to	CN		_
06.10.2010	06.10.2011	CN=Max Mustermann,OU=Lebensmittel GmbH,O=Musterfir		0
1-10	əf 1		۲	۷

Now, all necessary configurations have already been completed in order to configure the customer-specific certificate settings.

Of course, it is still possible to delete the certificate out of the table using delete-button.

After selecting a single row, you are able to retrieve more detailed information about the certificate as shown in the example as follows:

	Certificate Details	8
CN	CN=Max Mustermann,OU=Lebensmittel GmbH,O=Musterfirma XY,L=Musterstadt,ST=Wien,C=AT,1.2.840.113549.1.9.1=#1612 6d75737465726669726d6140676d782e6174	
Validity	06.10.2010 - 06.10.2011	
Serial Number	1286355693	
Issuer	CN=Max Mustermann,OU=Lebensmittel GmbH,O=Musterfirma XY,L=Musterstadt,ST=Wien,C=AT,1.2.840.113549.1.9.1=#1612 6d75737465726669726d6140676d782e6174	
Public Key	30:81:9f:30:0d:06:09:2a:86:48:86:f7:0d:01:01:01:05:00: 03:81:8d:00:30:81:89:02:81:81:00:c5:3c:ec:aa:07:67:d6: b8:71:12:c7:62:89:98:70:99:42:12:f5:0c:72:61:40:f9:69: 00:24:87:22:b6:81:56:07:fd:f8:b8:a8:b4:76:a4:12:85:95: b2:8a:c9:47:59:8a:3b:29:03:a4:75:18:1d:96:5b:2a:da:02: 32:61:e9:29:f1:4c:bd:f0:d2:9b:0e:e2:4d:6e:94:7c:cf:d5: d3:61:e9:29:f1:4c:bd:f0:d2:9b:0e:e2:4d:6e:94:7c:cf:d5: d3:61:e9:29:f1:4c:bd:f0:d2:9b:0e:e2:4d:6e:94:7c:cf:d5: d3:61:e9:29:f1:4c:bd:f0:d2:9b:0e:e2:4d:6e:94:7c:cf:d5: d3:61:e9:29:f1:4c:bd:f0:d2:9b:0e:e2:4d:6e:94:7c:cf:d5: d3:61:e9:29:f1:4c:bd:f0:d2:9b:0e:e2:4d:6e:94:7c:cf:d5: d3:61:e9:29:f1:4c:bd:f0:d2:9b:0e:e2:4d:6e:94:7c:cf:d5: d3:61:e9:29:f1:4c:bd:f0:d2:9b:0e:e2:4d:6e:94:7c:cf:d5: d3:61:e9:29:f1:4c:bd:f0:d2:9b:0e:e2:4d:6e:94:7c:cf:d5: d3:61:e9:29:f1:4c:bd:f0:d2:9b:0e:e2:4d:6e:94:7c:cf:d5: d3:61:e9:29:f1:4c:bd:f0:d2:9b:0e:e2:4d:6e:94:7c:cf:d5: d3:61:e9:29:f1:4c:bd:f0:d2:9b:0e:e2:4d:6e:94:7c:cf:d5: d3:61:e9:29:f1:4c:bd:f0:d2:9b:0e:e2:4d:6e:94:7c:cf:d5: d3:61:e9:29:f1:4c:bd:f0:d2:9b:0e:e2:4d:6e:94:7c:cf:d5: d3:61:e9:29:f1:4c:bd:f0:d2:9b:0e:e2:4d:6e:94:7c:cf:d5: d3:61:e9:29:f1:4c:bd:f0:d2:9b:0e:e2:4d:6e:94:7c:cf:d5: d3:61:e9:29:f1:4c:bd:f0:d2:9b:0e:e2:4d:6e:94:7c:cf:d5: d3:61:e9:29:f1:4c:bd:f0:d2:9b:0e:e2:4d:f0:d2:9b:0e:e2:4d:f0:d2:9b:0e:e2:4d:f0:d2:9b:0e:e2:4d:f0:d2:9b:0e:e2:4d:f0:d2:9b:0e:e2:4d:f0:d2:9b:0e:e2:4d:f0:d2:9b:0e:e2:4d:f0:d2:9b:0e:e2:4d:f0:d2:9b:0e:e2:4d:f0:d2:9b:0e:e2:4d:f0:d2:9b:0e:e2:4d:f0:d2:9b:0e:e2:4d:f0:d2:9b:0e:e2:4d:f0:d2:9b:0e:e2:4d:f0:d2:f0:d2:f0:f0:d2:f0:f0:f0:f0:f0:f0:f0:f0:f0:f0:f0:f0:f0:	
Fingerprint	ad:0a:ea:c4:f3:5a:1b:4a:00:04:44:56:c7:db:e4:c0	
Cancel		



The last step, before the first signed invoices can be sent to your partners, you have to configure some partner specific signature parameter.

These settings can be configured in the customer master data. Please open the company, for which signed invoices should be used and go to the tab "Signature".

Send invoice		
Send credit note		
Method	embedded per UNH	-
Encoding	Base64	+
Add public key		
Update segment counter		
Send invoice recipient	v	
Send invoice issuer		
Send addresses		
Send product descriptions		
Send vatid	V	

Please contact you partner in order to arrange the signature settings, which should be configured and complete the form using this information.

This is necessary in order to ensure the correct processing and validation on the side of the customer.