Tungsten e-Invoice Connect
Features Guide

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Preface

The *Tungsten e-Invoice Connect Features Guide* gives a high-level product overview with descriptions of key features and functionality.

If you are a customer or prospective customer, use this guide to become familiar with product features. This information can help you decide which features are best suited to meet the unique challenges faced by your organization.

Related documentation

The documentation set for Tungsten e-Invoice Connect is available online:

https://docshield.kofax.com/Portal/Products/InvoicePortal/InvoicePortal.htm

In addition to this guide, the documentation set includes the following items:

Tungsten e-Invoice Connect Administrator's Guide
Describes how to administer the Tungsten e-Invoice Connect system. This guide contains essential information for administrators who are responsible for configuring and maintaining the Tungsten e-Invoice Connect solution and member users.

Tungsten e-Invoice Connect Help
Offers detailed online assistance for both Tungsten e-Invoice Connect member administrators and users. The help system describes how to use the product.

Tungsten e-Invoice Connect API documentation
Provides the instruction on how to open up the application data and functionality to other Tungsten Automation products, external third-party developers, and business partners.

System requirements

Specification	Description
Browser	Tungsten e-Invoice Connect supports the latest versions of the following browsers: • Google Chrome • Microsoft Edge • Mozilla Firefox • Microsoft IE 11
Supported languages	• Danish • English • French • German • Norwegian • Swedish

Getting help with Tungsten Automation products

The Tungsten Automation Knowledge Base repository contains articles that are updated on a regular basis to keep you informed about Tungsten Automation products. We encourage you to use the Knowledge Base to obtain answers to your product questions.

To access the Tungsten Automation Knowledge Base, go to the Tungsten Automation website and select **Support** on the home page.

> The Tungsten Automation Knowledge Base is optimized for use with Google Chrome, Mozilla Firefox or Microsoft Edge.

The Tungsten Automation Knowledge Base provides:

- Powerful search capabilities to help you quickly locate the information you need.

  Type your search terms or phrase into the **Search** box, and then click the search icon.
- Product information, configuration details and documentation, including release news.

  Scroll through the Tungsten Automation Knowledge Base home page to locate a product family. Then click a product family name to view a list of related articles. Please note that some product families require a valid Tungsten Automation Portal login to view related articles.
- Access to the Tungsten Automation Customer Portal (for eligible customers).

  Click the **Customer Support** link at the top of the page, and then click **Log in to the Customer Portal**.
- Access to the Tungsten Automation Partner Portal (for eligible partners).

  Click the **Partner Support** link at the top of the page, and then click **Log in to the Partner Portal**.

- Access to Tungsten Automation support commitments, lifecycle policies, electronic fulfillment details, and self-service tools.

  Scroll to the **General Support** section, click **Support Details**, and then select the appropriate tab.
- Join the Tungsten Automation Community to share Tungsten Automation product knowledge and experiences, help solve business issues, learn new use cases and share ideas. Tungsten Automation employees are updating the open forum on a regular basis.

Chapter 1

About Tungsten e-Invoice Connect

Tungsten e-Invoice Connect is an online solution for reducing the time and money spent on sending and receiving physical invoices. With a global electronic invoicing exchange network, e-Invoice Connect enables organizations to securely share invoice data electronically by placing it directly into ERP systems.

With this solution, users can easily manage their suppliers, buyers and accounts from any online access point, including supplier searches and connections. Tungsten e-Invoice Connect offers an online community that connects buyers and suppliers, making incorporating e-invoicing into AP practices convenient, as well as delivering increased efficiency, stronger automation, lower risk of errors and fraud, and cost savings.

What is e-invoicing

E-invoicing (also referred to as electronic invoicing) automates the process of sending and receiving invoices. An e-invoice is an invoice that is issued, transmitted, received, processed, and stored electronically using specific document formats.

E-invoicing can help replace manual tasks with automated business rules and actions to increase efficiency, minimize error handling, and help organizations comply with e-invoicing legislation.

How e-Invoice Connect can help

Tungsten e-Invoice Connect is an online solution for sending and receiving invoices electronically. With this solution, suppliers can send invoices in their preferred format, and the solution automatically converts and delivers those invoices electronically. e-Invoice Connect enables suppliers and buyers to easily view the status of an invoice, resulting in more control and improved connections.

Tungsten e-Invoice Connect:

- Automatically routes e-invoices and non-PO invoices to the correct departments within your organization.
- Checks for valid invoice content, either by Master Data control or format validation, then routes rejections of faulty invoices back to the sender.
- Verifies reference codes and ensures correct references on invoices.
- Saves valuable time by eliminating the need to manually correct errors in the workflow.

e-Invoice Connect is cloud-based, which ensures that users can always access the latest version. System upgrades are deployed without interruptions, making expensive upgrade projects a thing of the past.

For more information about the product options and features, see Tungsten e-Invoice Connect overview.

Chapter 2

Two-factor authentication

With two-factor authentication, you can improve the security of your Tungsten e-Invoice Connect account. When you want to sign in, you need to provide two pieces of information, such as your password and the six-digit verification code that is automatically generated on your mobile phone two-factor authentication application, such as Microsoft Authenticator, Google Authenticator, LastPass, Authy, or Duo Mobile.

While you can continue using the password alone to securely access your e-Invoice Connect account, two-factor authentication significantly improves the security of your account and all the personal information that you store there.

When you log in for the first time, you are prompted to set up the two-factor authentication. You can select one of the following options:

- **Yes**: See the "Configure from the login page" topic in *Tungsten e-Invoice Connect Help* to configure this option.
- **No**: Continue working without two-factor authentication for the next 14 days.
- **Cancel**: Redirects you to the login page. When you log in next time, you are prompted to set up two-factor authentication again.

Also, you can navigate to **Settings** > **User** and under **Two-factor authentication setup**, click **Activate** or **Deactivate** to set up or turn off two-factor authentication.

To log in to Tungsten e-Invoice Connect with the previously configured two-factor authentication in case you do not have your mobile phone available, see the "Log in with recovery codes" topic in the *Tungsten e-Invoice Connect Help*.

Chapter 3

Application Programming Interface (API)

The API enables Tungsten e-Invoice Connect to open up its application data and functionality to other Kofax products, external third-party developers, and business partners. This allows services and products to communicate with each other and leverage each other's data and functionality through a documented interface.

The API resides between an application and the Web server, acting as an intermediary layer that processes data transfer between systems. The data transfer is performed by requests and responses exchanged through an API. Whereas a user interface is designed for use by humans, APIs are designed for use by a computer or application.

The e-Invoice Connect API is implemented as Representational State Transfer (REST) web service.

If you use other Tungsten Automation products, you can access your e-Invoice Connect member data from these products via the API. Also, your e-Invoice Connect member can enable access via the API to manage the member data.

The e-Invoice Connect API documentation is available on the Product Documentation site.

e-Invoice Connect resources

With Tungsten e-Invoice Connect APIs, you can access and modify the following e-Invoice Connect resources.

e-Invoice Connect resources	Interaction options
Members	• View the list of members in e-Invoice Connect. • Manage the settings and the status of the existing members. • Create new members.
Member addresses	• View the list of member addresses in e-Invoice Connect. • Create a new address and associate it with a member. • Remove member addresses.
Party identifiers	• View the list of member party identifiers. • Create new party identifiers. • Get detailed information about member party identifiers.
Member users	• View the list of member users. • Create new member users. • Update member users. • Remove member users.
Invoices	• Search for invoices. • View invoice details. • Manage invoice attachments. • View invoice status.
Suppliers	• Upload suppliers to e-Invoice Connect members.

Single sign-on (SSO)

Single Sign-On (SSO) is a third-party authentication source that authenticates users or verifies that a user is already logged in, then presents Tungsten e-Invoice Connect with the relevant user credentials.

Tungsten e-Invoice Connect implements API to support SSO without showing the login and consent screens.

e-Invoice Connect supports single sign-on using the Kofax AP Essentials authentication. To go directly from the Kofax AP Essentials site to the Tungsten e-Invoice Connect site without a prompt to enter credentials, a Kofax AP Essentials user can click **Open Invoice Portal**.

Chapter 4

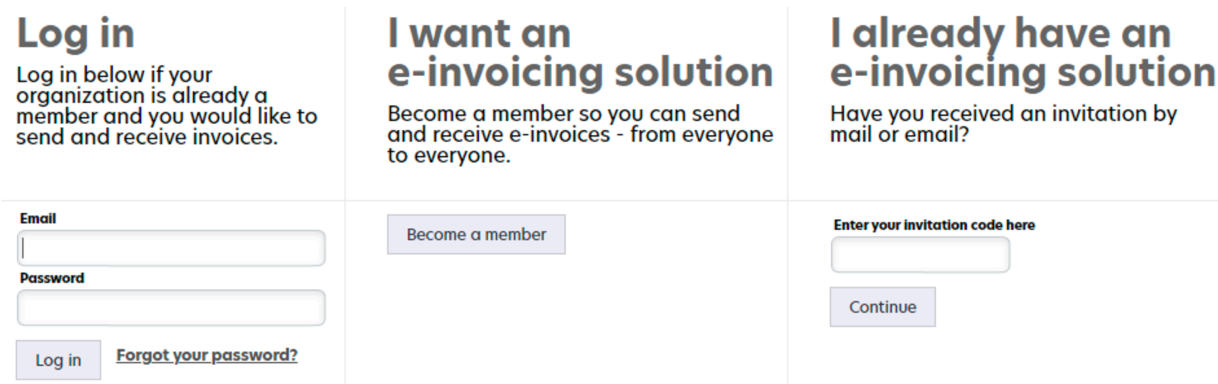
White labeling

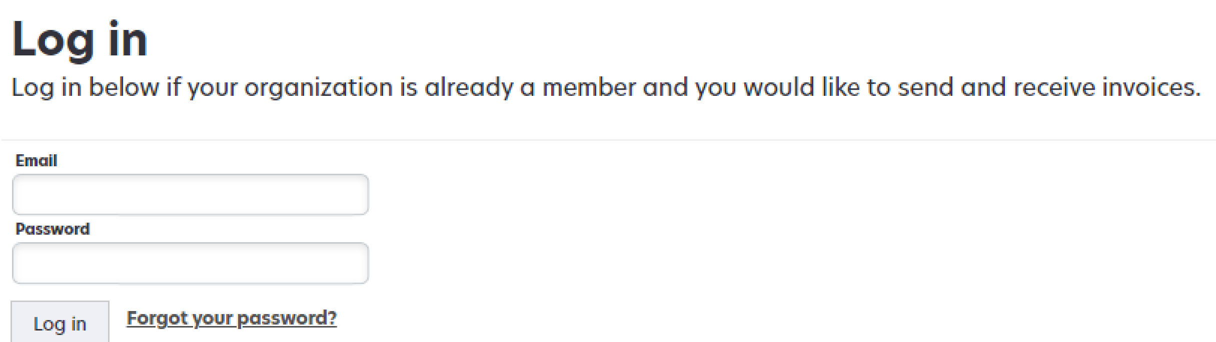
e-Invoice Connect supports the white labeling option upon special request. This feature enables the replacement of the Tungsten Automation-branded user interface elements to make the product look compatible with the customer brands. With the white labeling feature, you can hide or replace the company name, product name, and logo according to your requirements.

White labeling gives you the ability to access e-Invoice Connect using a custom URL. The URL can be customized by selecting a subdomain of Tungsten e-Invoice Connect, a subdomain of your own domain, or a new domain.

You can request to customize the following e-Invoice Connect items.

- **Login page**: Change the color of the background and of the text.
  Also, you can request to simplify the page by removing extra registration options.





- **Header area**: Replace the logo (company name and product name). Change the color of the header background, the color of the text, and the color of the line under the header. Also, if you do not want to have the product interface language changed, hide the language drop-down list.

- **Tab menu**: Change the color of the tab background and the color of the text.
- **Footer**: Change the color of the footer background and the color of the text. Remove the membership level.
- **Welcome page**: Remove the membership level, if required.

Chapter 5

Supported e-invoice formats

This chapter lists and describes public e-invoice formats supported by e-Invoice Connect. Many customer-specific formats are also supported. You can request a quote for the implementation of your custom format from the Support.

BGC Invoice

BGC Invoice is an XML invoice standard. BGC stands for "bank giro credit" and means any cash or checks paid into your bank over the counter in a branch.

An invoice is sent in the BGC format by a supplier and received by e-Invoice Connect before transferring to the recipient (customer).

E2B

E2B is an XML invoice standard that is used in Norway. The main scope of the format is to cover domestic Norwegian invoicing, but it may also be used for cross-border invoicing to a limited extent.

The format is used both as a target and source format. e-Invoice Connect converts the sender's format to the recipient's format using the internal Esxml2 format.

The E2B format is mostly replaced by PEPPOL BIS Billing 3.0.

Esxml2

This is an internal format, which is also used externally by some customers.

Factur-X

Factur-X is a Franco-German standard for hybrid e-invoice (PDF for users and XML data for process automation) that follows the European Semantic Standard EN 16931.

Finvoice 3

Finvoice is a publicly available invoicing standard published by Finnish banks. It is also a forwarding service for businesses, provided by banks and payment institutions.

e-Invoice Connect supports version 3.x of this format, according to the requirement imposed by the association of Finnish e-invoicing operators.

The format is used both as a target and source format. e-Invoice Connect converts the sender's format to the recipient's format using the internal Esxml2 format.

OIOUBL

OIOUBL is a customization for Danish business requirements of the international UBL 2.0 standard from OASIS (the Organization for the Advancement of Structured Information Standards).

The format is used both as a target and source format. e-Invoice Connect converts the sender's format to the recipient's format using the internal Esxml2 format.

OIOXML

An invoice is sent in the OIOXML format by a supplier and received by Tungsten e-Invoice Connect before transferring to the recipient (customer).

The OIOXML format is currently deprecated.

PEPPOL BIS Billing 3.0

PEPPOL is an international e-invoicing network used to safely send e-invoices to companies and governments worldwide. For more information, see Integration with Peppol.

The format is used both as a target and source format. e-Invoice Connect converts the sender's format to the recipient's format using the internal Esxml2 format.

Pyramid

An invoice is sent in this format by a supplier and received by Tungsten e-Invoice Connect before transferring to the recipient (customer).

Svefaktura

Svefaktura is an XML invoice standard used in Sweden for electronic invoices exchange that is based on OASIS Universal Business Language (UBL). With Svefaktura, you can easily send and receive electronic invoices without special agreements between the parties.

The format is used both as a target and source format. e-Invoice Connect converts the sender's format to the recipient's format using the internal Esxml2 format. Several variants are available, with some being customer-specific.

The Svefaktura format is accepted by the public entities in Sweden, but PEPPOL BIS Billing 3.0 is preferred.

TEAPPSXML

e-Invoice Connect supports the TEAPPSXML 3.0 format. TEAPPSXML 3.0 is the XML-based standard with new data elements required by the European Standard EN on electronic invoicing.

The format is used both as a target and source format. e-Invoice Connect converts the sender's format to the recipient's format using the internal Esxml2 format.

XRechnung 2.1

XRechnung is a standard for electronic invoicing in Germany. It is a mandatory standard for sending invoices to the German government. XRechnung affects all public institutions and authorities. It does not matter whether the contractor is from Germany or another EU country. All invoices to the authorities must be issued in the XRechnung format.

e-Invoice Connect implements support for the most commonly used features of this format so that invoices can be sent and received in the XRechnung format.

ZugFERD

ZUGFeRD is a hybrid invoice format in Germany that follows the European Semantic Standard EN 16931. It consists of an XML code and is supplemented by a classic invoice design as a PDF.

Chapter 6

Integration with Peppol

Peppol (Pan-European Public Procurement Online) is an electronic delivery network that establishes secure communication with government agencies. Peppol defines common technical standards and business processes in order to connect different procurement systems. Currently, Peppol is widely used by public agencies and private companies all over the world for e-invoicing.

The Peppol Business Interoperability Specifications (BIS) standardize the requirements for sending, receiving, and storing electronic documents.

According to legal requirements for some countries, invoices for certain receivers must be registered in Peppol. An administrator from the Tungsten e-Invoice Connect team can configure e-Invoice Connect member accounts to loop invoices through the Peppol network if required by invoice receivers.

The current format developed for e-invoices and credit invoices within the Peppol network is called Peppol BIS Billing 3.0.

To meet specific legal requirements regarding the invoice flow and Peppol, contact Tungsten e-Invoice Connect Support.

Chapter 7

Tungsten e-Invoice Connect overview

This chapter gives you a basic overview of the Tungsten e-Invoice Connect features available to member administrators and member users. For in-depth information about the product, see the *Tungsten e-Invoice Connect Help*.

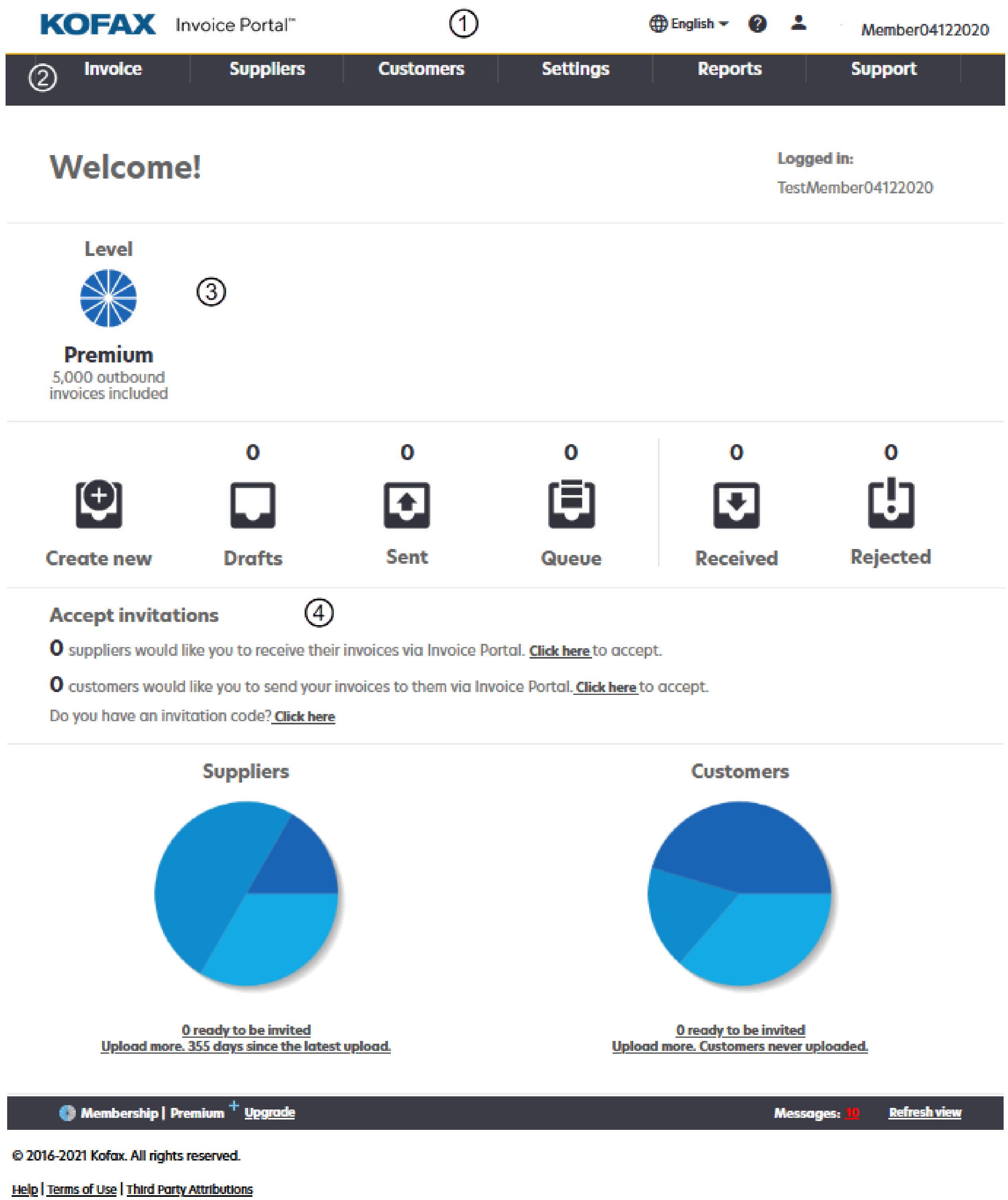
The options available in Tungsten e-Invoice Connect depend on your system permissions.

e-Invoice Connect member administrators have advanced menu options to send or receive invoices and to configure extra settings for all member accounts, including their own.

e-Invoice Connect member users have standard privileges set up by a member administrator. Member users have basic menu options to send or receive invoices and to configure general settings for their account.

Welcome page

Use the Welcome page to access invoices, suppliers, or customers. From this page, you can create invoices and view drafts, sent, received, or rejected invoices.


KOFAX Invoice Portal™
1
English
Member04122020
2
Invoice
Suppliers
Customers
Settings
Reports
Support
Welcome!
Logged in:
TestMember04122020
Level
3
Premium
5,000 outbound invoices included
0
0
0
0
0
Create new
Drafts
Sent
Queue
Received
Rejected
Accept invitations
4
0 suppliers would like you to receive their invoices via Invoice Portal. Click here to accept.
0 customers would like you to send your invoices to them via Invoice Portal. Click here to accept.
Do you have an invitation code? Click here
Suppliers
Customers
0 ready to be invited
Upload more. 355 days since the latest upload.
0 ready to be invited
Upload more. Customers never uploaded.
Membership | Premium + Upgrade
Messages: 10
Refresh view
© 2016-2021 Kofax. All rights reserved.
Help | Terms of Use | Third Party Attributions

1	**Header area**: Available on all pages throughout the system. • Click the Tungsten Automation logo to go back to the Welcome page from any other e-Invoice Connect page. • Click the language name to view or select a user interface language. • Click the Help icon to open the Tungsten e-Invoice Connect help in a new browser tab. • Click the User menu icon and select **Log out** to terminate your session.
2	**Tab menu**: The available functionality is grouped by tabs. Place the cursor over a tab to view the available options (subtabs) within the tab. • Invoice • Suppliers • Customers • Settings • Reports • Support The options available under the e-Invoice Connect tab menu depend on your system permissions.
3	**Membership level**: View your membership level indicating the number of invoices available to you per month. • Free: Up to 25 invoices per month. • Basic: Up to 100 invoices per month. • Plus: 500 invoices per month included. More Plus-packages are added automatically as needed. • Premium: 5,000 invoices per month included. More Premium-packages are added automatically as needed.
4	**Accept invitations**: • View a list of all organizations that have invited you to start receiving their invoices. • View a list of all organizations that have invited you to start sending them invoices. • Accept the invitation by entering your invitation code.

Invoice tab

After you configure e-Invoice Connect to start receiving invoices, invoices sent to you through Tungsten e-Invoice Connect are formatted, filtered, and delivered according to your settings. You can view incoming invoices in the web interface and at the file transport channel specified in your receiving settings.

After you configure e-Invoice Connect to start sending invoices, you can create and send invoices in the web interface, transfer invoices from your business system depending on your membership level (not available for the Free level), and check the status of your sent invoices.

To view the available options (subtabs) within the tab, place the cursor over a tab and click the tab name so that the subtabs stay in place if you move the cursor.

For detailed information about the options available under the **Invoice** tab, see *Kofax Invoice Portal Help*.

Create new

To create an invoice, fill in all the required fields. The available fields depend on the information your recipient requires on the invoice.

Also, the available fields depend on your business rule configuration. Not all of the fields are shown to every e-Invoice Connect member user.

Drafts

Created invoices that are saved and not sent are placed on the list of draft invoices available on the **Drafts** tab. You can edit or delete the drafts.

Sent

Invoices that are sent to customers are placed under **Invoice** > **Sent**. You can view and copy your sent invoices.

Received

If a supplier sends you an invoice through Tungsten e-Invoice Connect, it is placed under **Invoice** > **Received**. You can view received invoices and search for them by various criteria.

Rejected

Tungsten e-Invoice Connect rejects invoices that do not match the recipient's acceptance criteria.

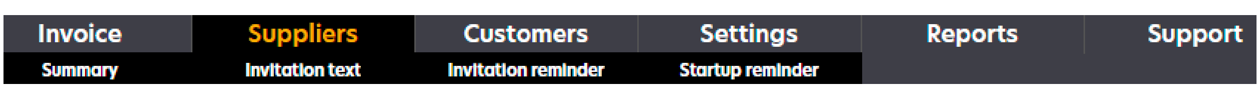
Queued

Invoice queuing is used to enhance control over invoices transferred from your business system that are actually delivered to the recipients. You can view, send, or delete queued invoices. A user needs to take additional actions before sending queued invoices.

Suppliers tab

Use the **Suppliers** tab to enable electronic communication for your suppliers.

To view the available options (subtabs) within the tab, place the cursor over a tab and click the tab name so that the subtabs stay in place if you move the cursor.



Summary

Invite your suppliers to start sending invoices electronically.

- Add suppliers: Add your suppliers to Tungsten e-Invoice Connect.
- Invite: Invite suppliers to start sending invoices electronically.
- Confirm: Some suppliers require more processing before you can invite them. In these cases, you might need to confirm the supplier match or add missing contact information.
- Check suppliers: At any point, see on which stage of the onboarding process your suppliers are.
- Remind: Remind your suppliers that you want to receive invoices electronically.
- Done: Find out which suppliers are currently sending you e-invoices.

Invitation text

Tungsten e-Invoice Connect suggests various templates that are automatically inserted by the system. You can add your specific instructions to one part of a template.

Invitation reminder

After sending an invitation to suppliers, send a reminder to them.

Startup reminder

After suppliers accept your invitation and set up an account, sometimes you need to send them a reminder to start using electronic invoicing.

Customers tab

Use the **Customers** tab to enable electronic communication for your customers.

To view the available options (subtabs) within the tab, place the cursor over a tab and click the tab name so that the subtabs stay in place if you move the cursor.

Summary

Invite your customers to start receiving invoices electronically.

- Add customers: Add your customers to Tungsten e-Invoice Connect.
- Invite: Invite customers to start receiving invoices electronically.
- Confirm: Some customers require more processing before you can invite them. In these cases, you might need to confirm the customer match or add missing contact information.
- Check customers: At any point, see where your customers are in the onboarding process.

- Remind: Remind your customers that you want to send invoices electronically.
- Done: Find out which customers are currently receiving your e-invoices.

Invitation text

Tungsten e-Invoice Connect suggests various templates that are automatically inserted by the system. You can add your specific instructions to one part of a template.

Invitation reminder

After sending an invitation to customers, send a reminder to them.

Settings tab

The options available under **Settings** depend on your system permissions. See *Kofax Invoice Portal Help* for member users and member administrators.

Member account

The following options are available for member administrators only.

- Select whether to send or receive invoices through Tungsten e-Invoice Connect.
- Add and edit your identifiers.
- Specify your tax certificate and registered office.
- Add a logo to invoices.
- Change how estimated savings are calculated.

User

- Edit the user name and contact information.
- Change your email address.
- Change your password.
- Select notification settings according to your requirements.
- Set up or disable the two-factor authentication feature.

Sending

The following options are available for member administrators only.

- Select currency and rounding method.
- Specify payment method.

- Set up the printing service to send invoices and invitations to non-members.
- Specify the outgoing email address.
- Remove a VAT rate.
- Set the start value for invoice numbers.
- Use factoring.

Receiving

- Suspend or disable rejection of incoming invoices.
- Specify an incoming invoice format, recipient profile, and file transport means.
- Use reference values for validation.
- Restrict invoice senders.
- Block and unblock suppliers.

Addresses

Under **Addresses**, you can view, edit, and delete electronic recipients and delivery addresses within your organization as well as change the legal address.

Account users

The **Account users** page is available for member administrators only.

Edit settings for all your member users. From the list of users, select a user to configure. Tungsten e-Invoice Connect redirects you to the **User** settings page.

Also, you can add existing and new users.

Reports tab

Under **Reports** > **Statistical reports** you can create a member activity report for the indicated period of time in the Excel file format.

Support tab

Use **Support** to view help information or create a support request, depending on your membership level, or open the Tungsten e-Invoice Connect online help in a new browser tab.

If your e-Invoice Connect subscription level is Free or Basic, use the help links to find quick answers to your questions.

For Plus and Premium level users and members with the Kofax AP Essentials license, the following options are available:

- Follow the help links to find quick answers to your questions.
- Fill in the support request form to send an email to Support.