Invoice Matchpoint User Manual

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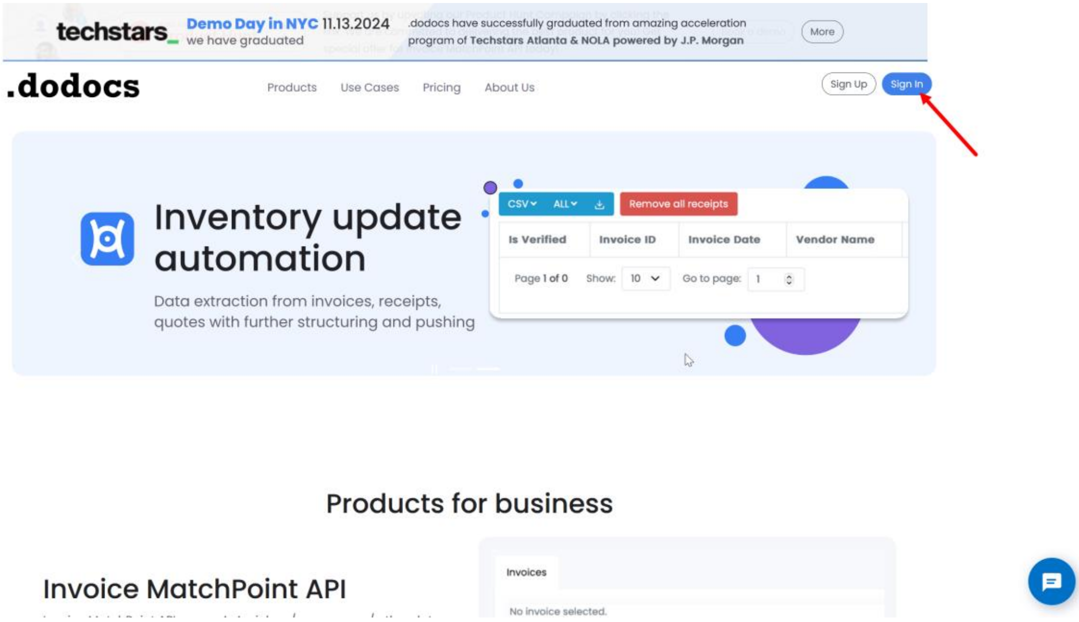
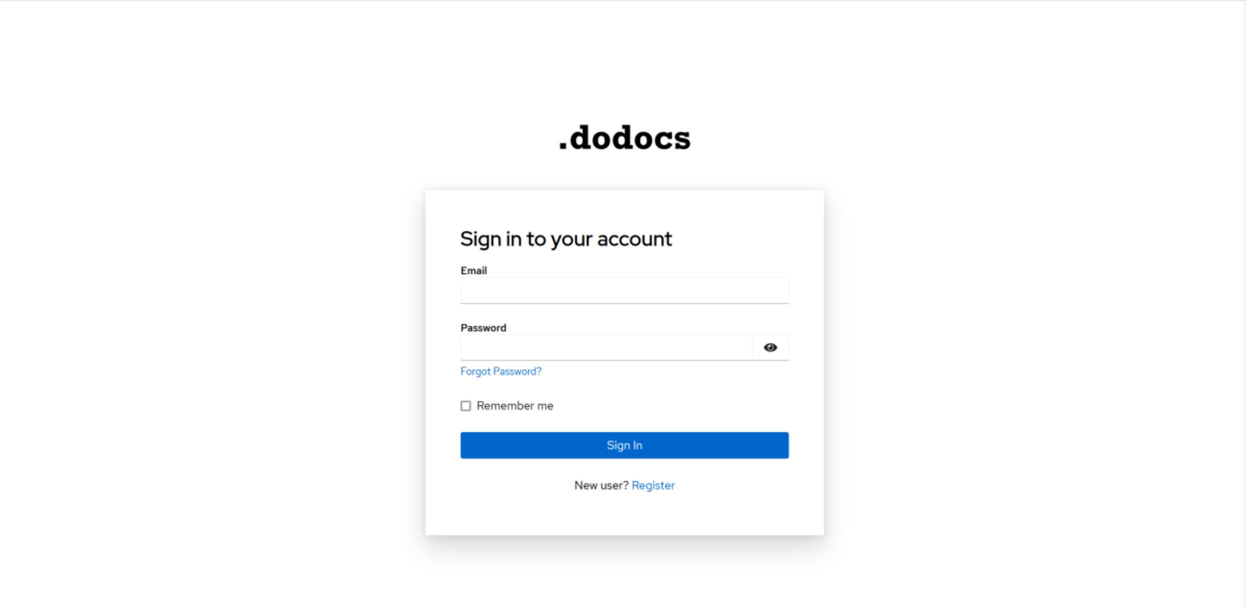
Logging in

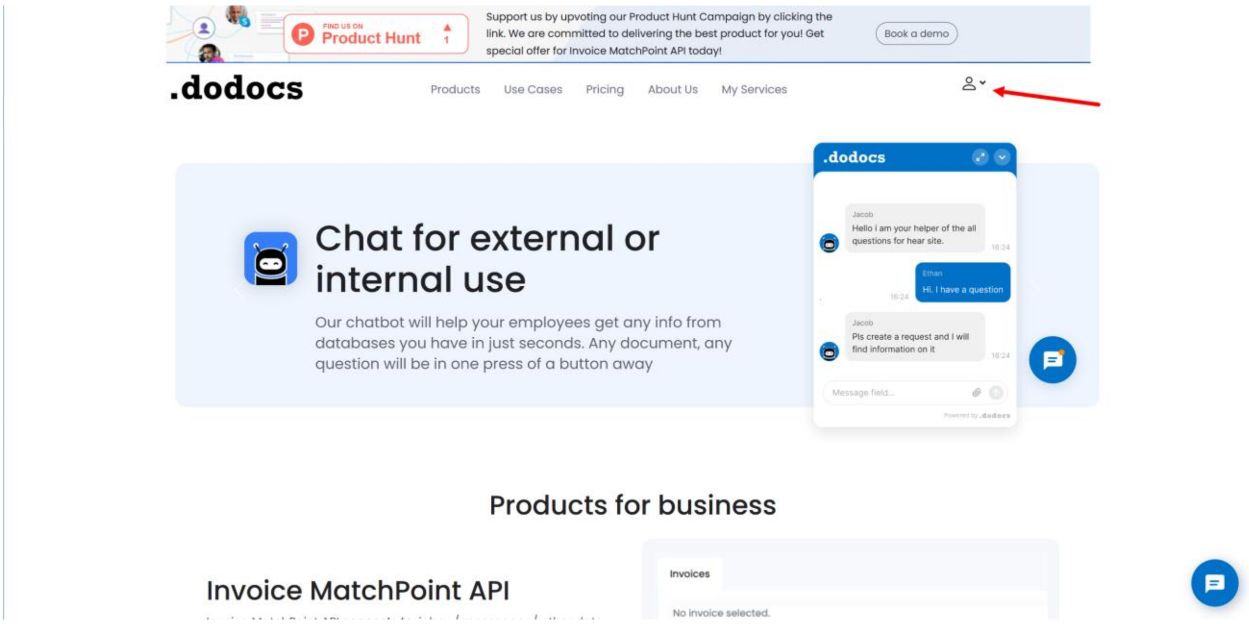
1) Click a “Sign in” button.

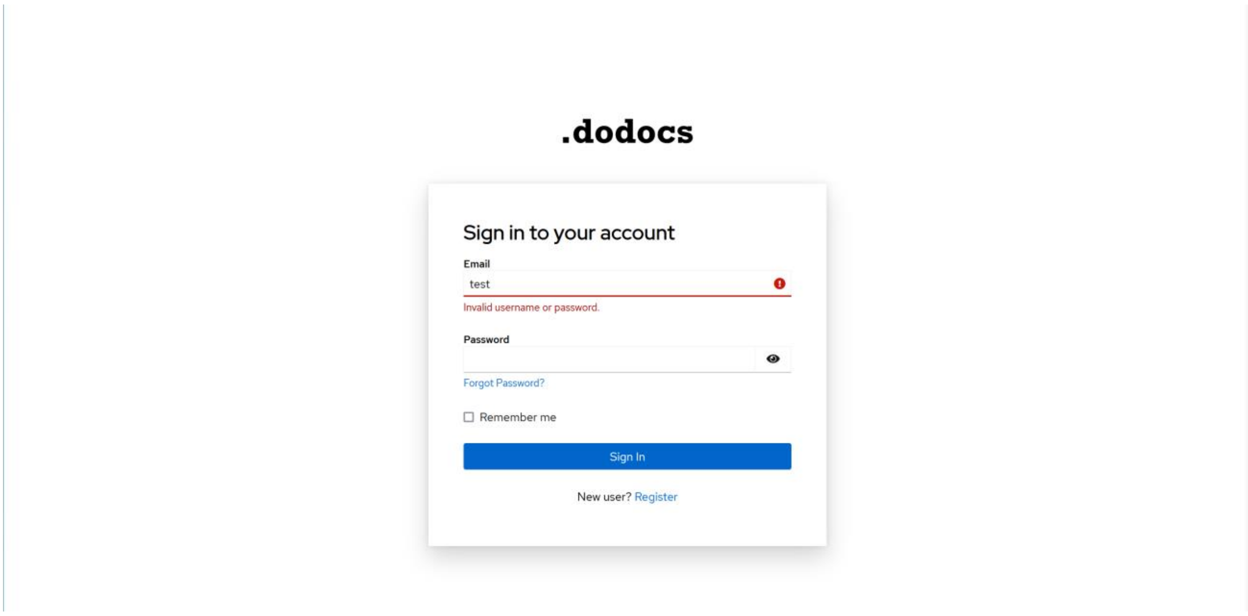


2) This button will take you to a page, where you have to enter your email and password.



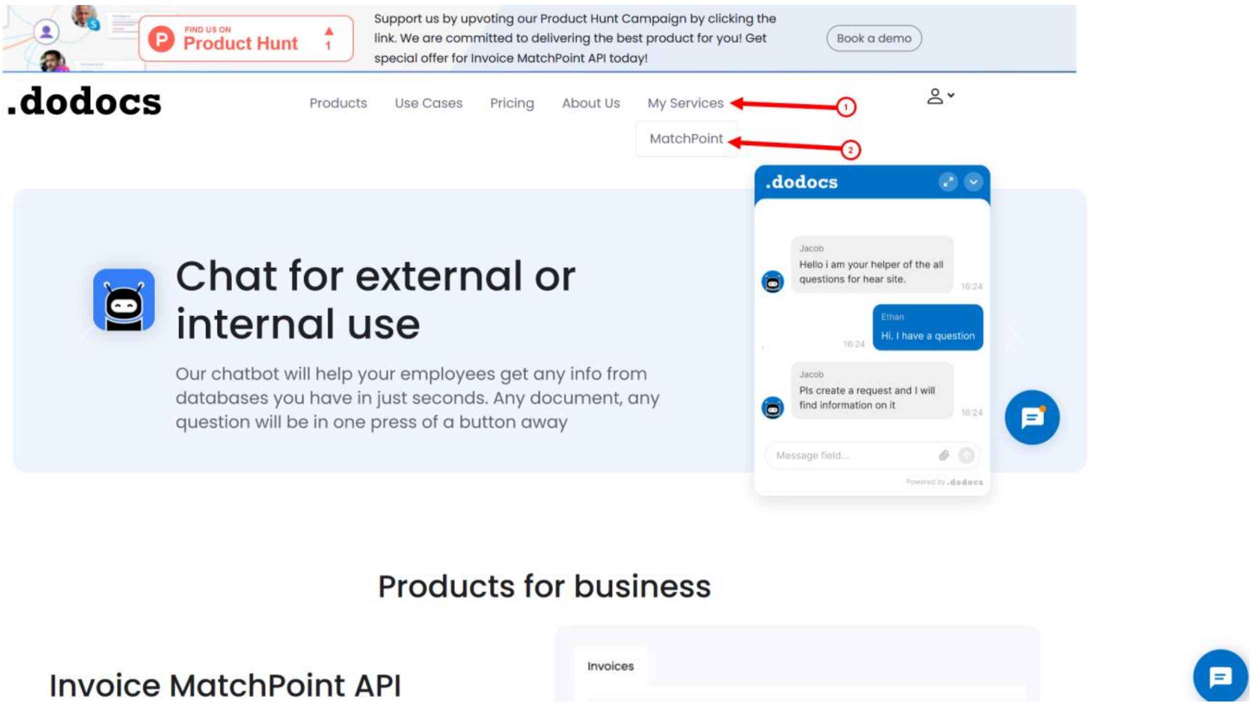
3) After that press a “Sign in” button.
4) If you entered the correct information, the page will change back to the main page and on it the “Sign up” and “Sign in” buttons will become a button with a stylized human on it. Otherwise the Sign in window will stay open and a red sentence that says “Invalid username or password” will appear.



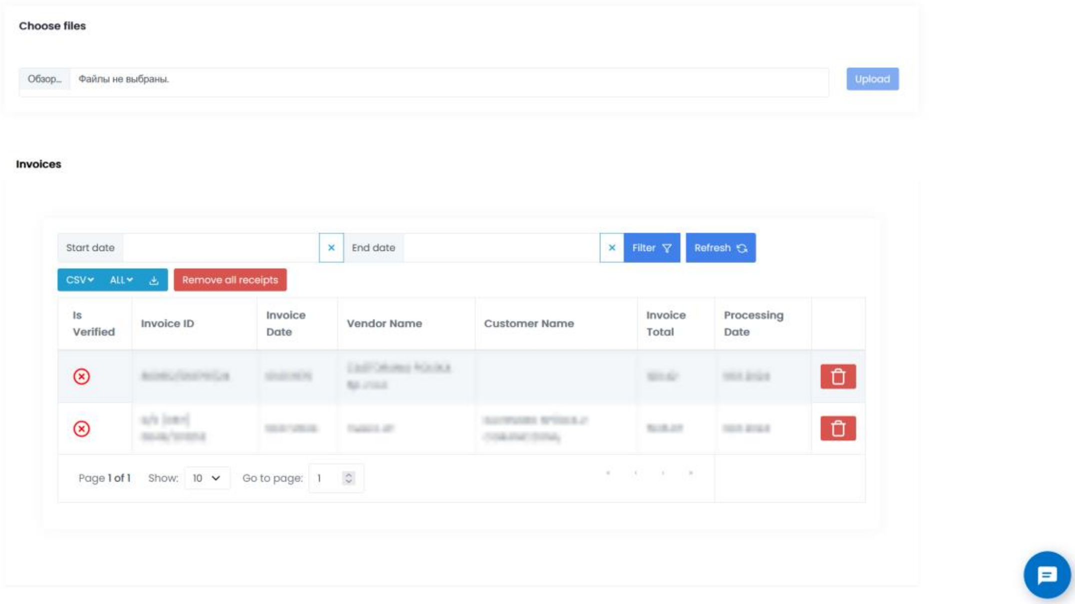


Finding Invoices service

1) After you Sign in "My Services" button (1) will appear. Hover your cursor over it. A matchpoint button (2) will appear. Click on it.

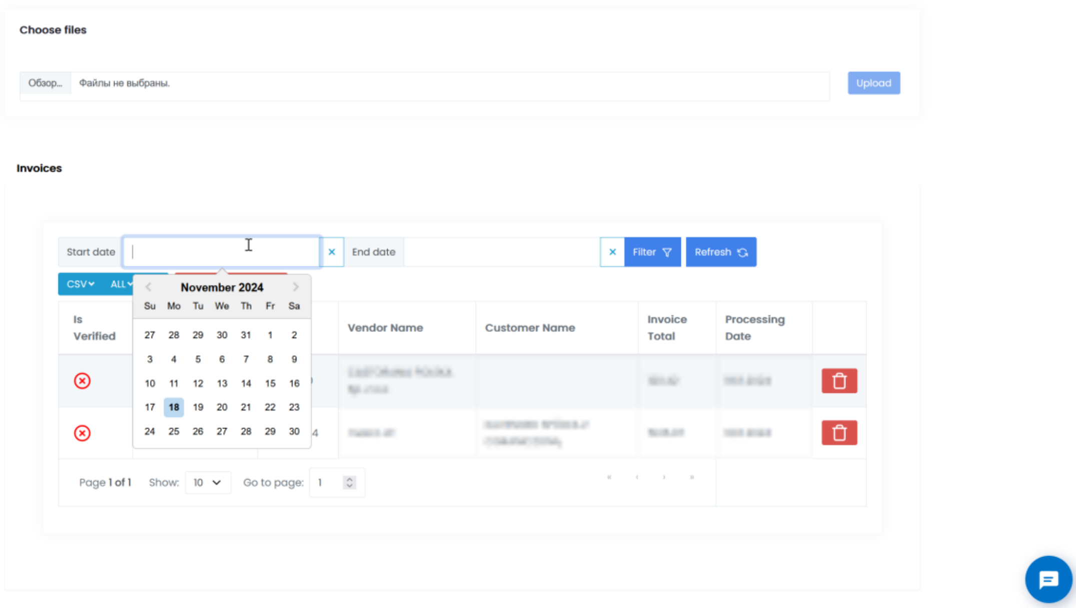


2) If you click on it, you will see a file upload menu and a table with your documents. If you've just started, you will not see any documents here.

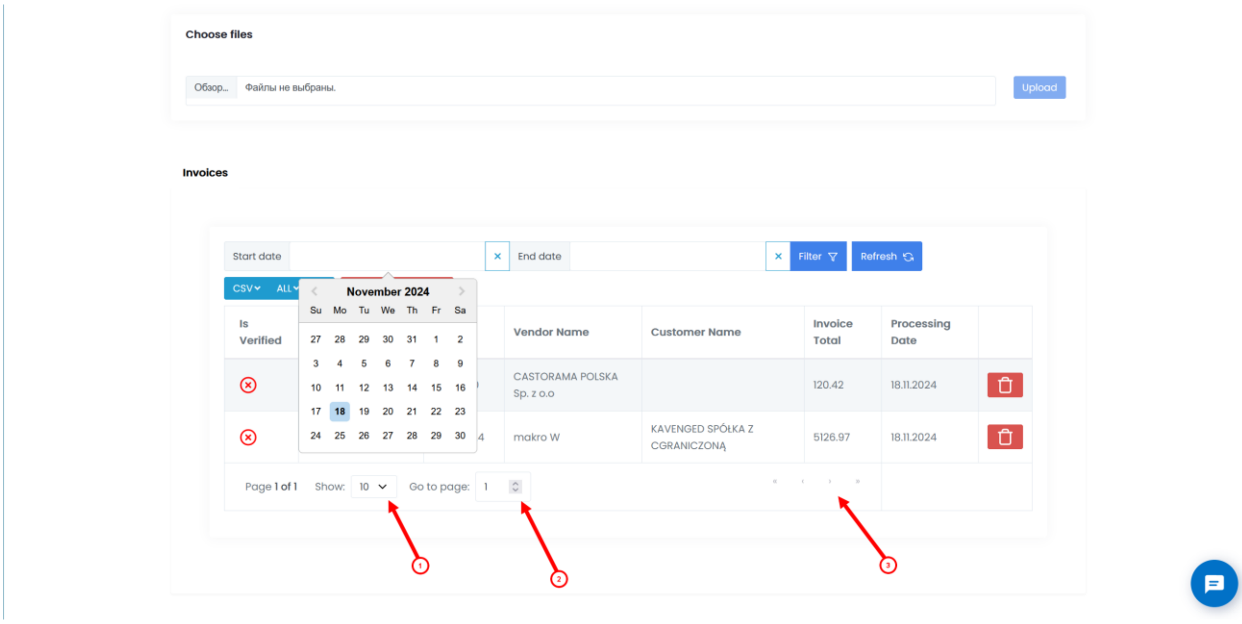


Filtering Documents

1) You can Filter your documents using boxes above the table. Fill in some of those boxes with required information to start. You can enter it using the keyboard or a calendar that appears on date fields.



2) You can choose how many documents show up on a page (1) and pick a page to go to, either using a box with a redactable number in it (2) or the arrows on the right (3);



Editing Files

1) You can click on a document row to open the redacting menu of this document. Here you can edit any information in the boxes.

2) To save the changes you've done, click "Save". This will also close the editing menu.

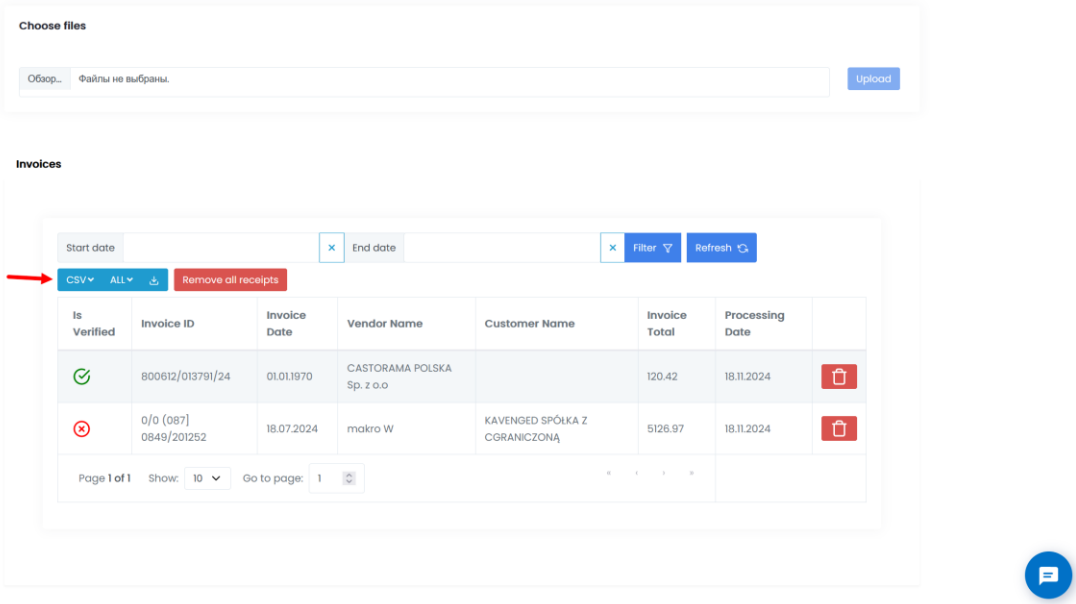
3) You can Mark your Document as verified by clicking a green "Mark as Verified". This can be used later to download only those documents that you need (Refer to "**Downloading Files**").

4) If you want to take away a Verified mark from one of the documents, you can click "Mark as Unverified".

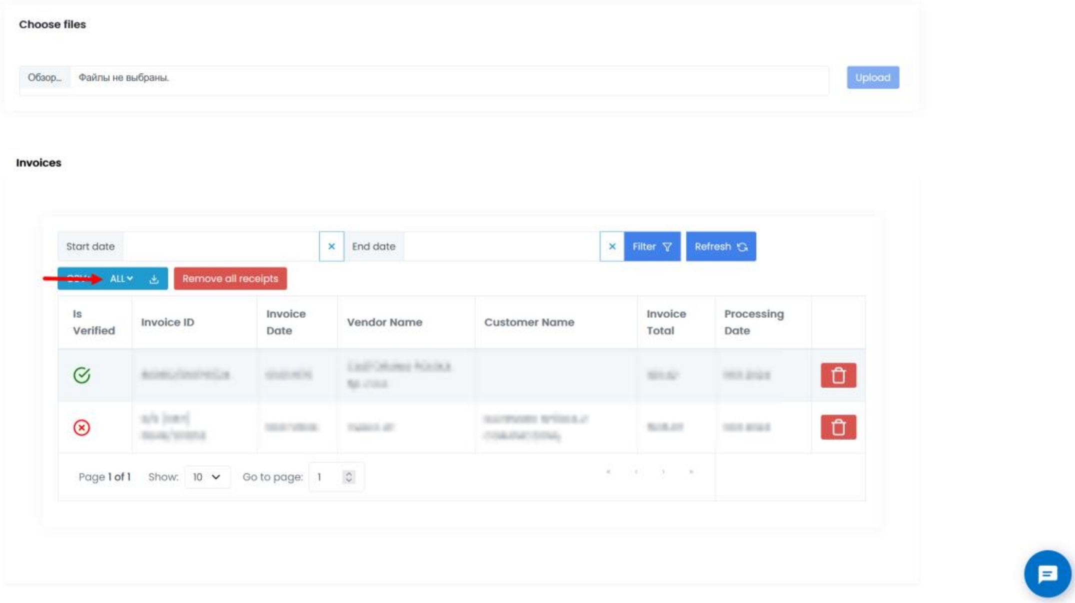
5) If you want to close this menu without saving changes, you can click "Close".

Downloading Files

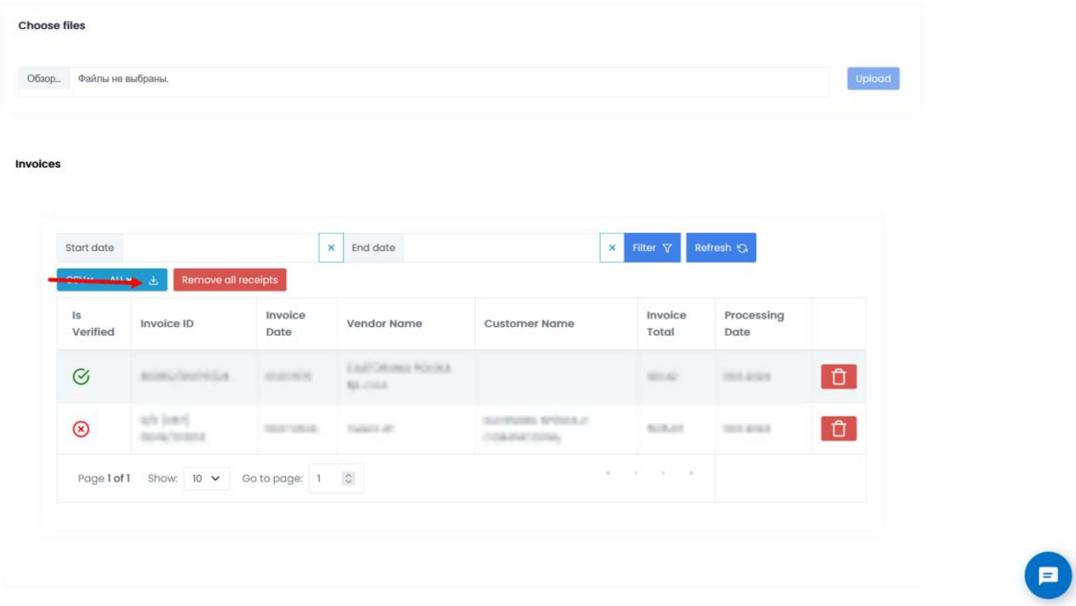
1) Pick a format, in which you want to download information, using a blue button that opens up a drop down menu with “CSV” or “JPK” and choose the one you need.



2)Click the next button on the right to pick “All” or “Verified” from another drop down menu. If “All” is picked, then you will download all files, if “Verified” is picked, then you will download only those files, that were verified by you.

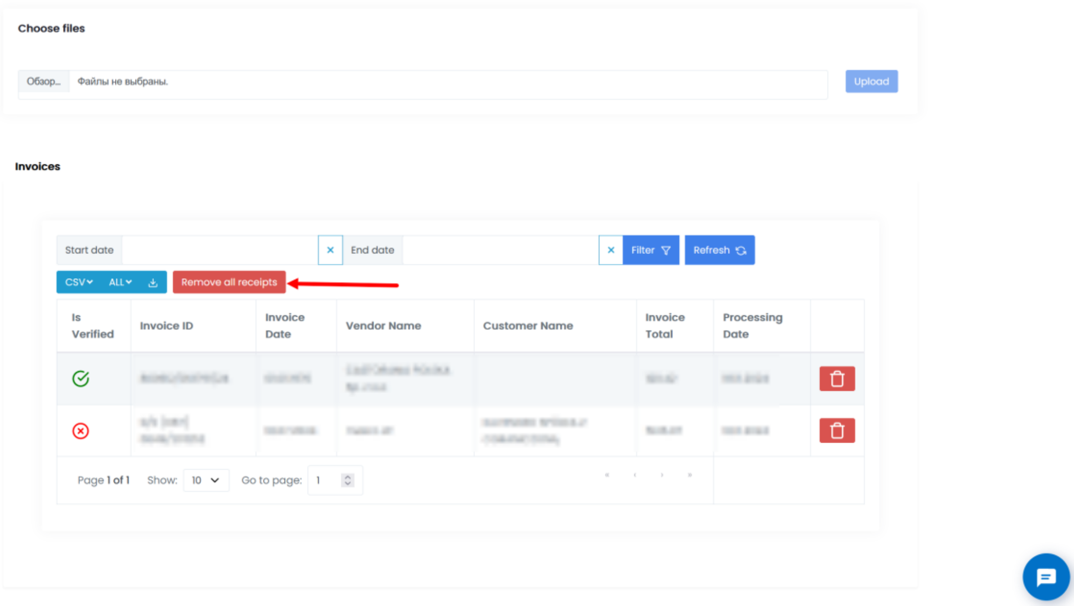


3) Click on the button with an “arrow down” symbol to download the files that you have chosen in previous steps.

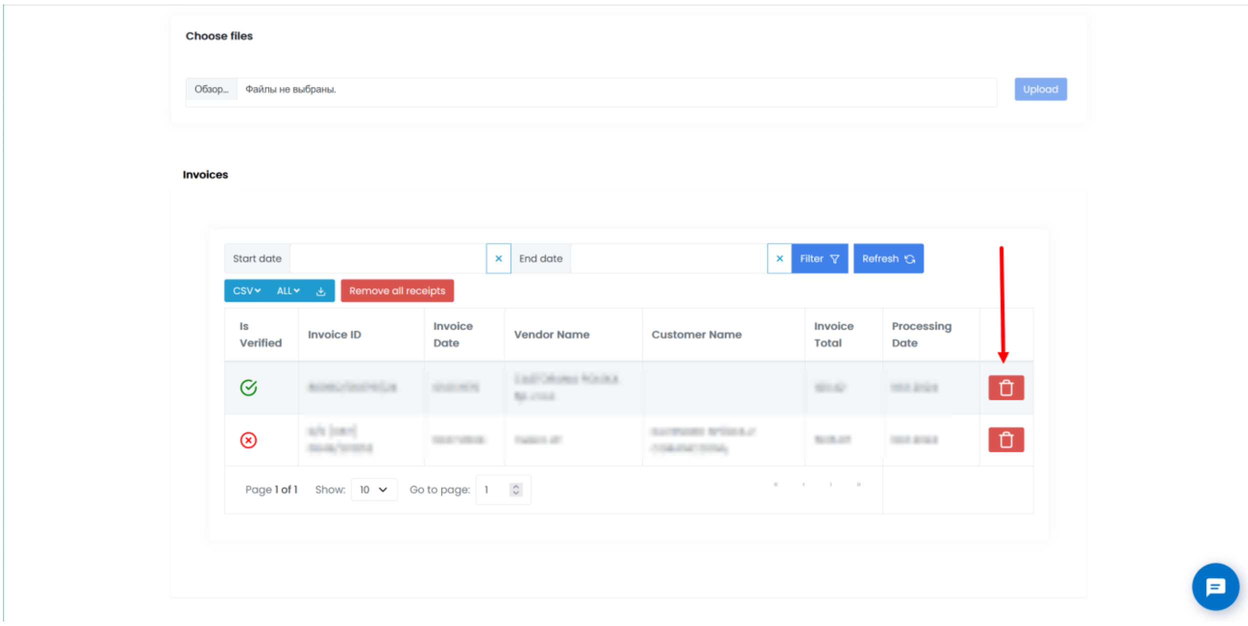


Deleting Files

1) You can remove all receipts by clicking the “Remove all receipts” button. This will fully delete all files from the service!

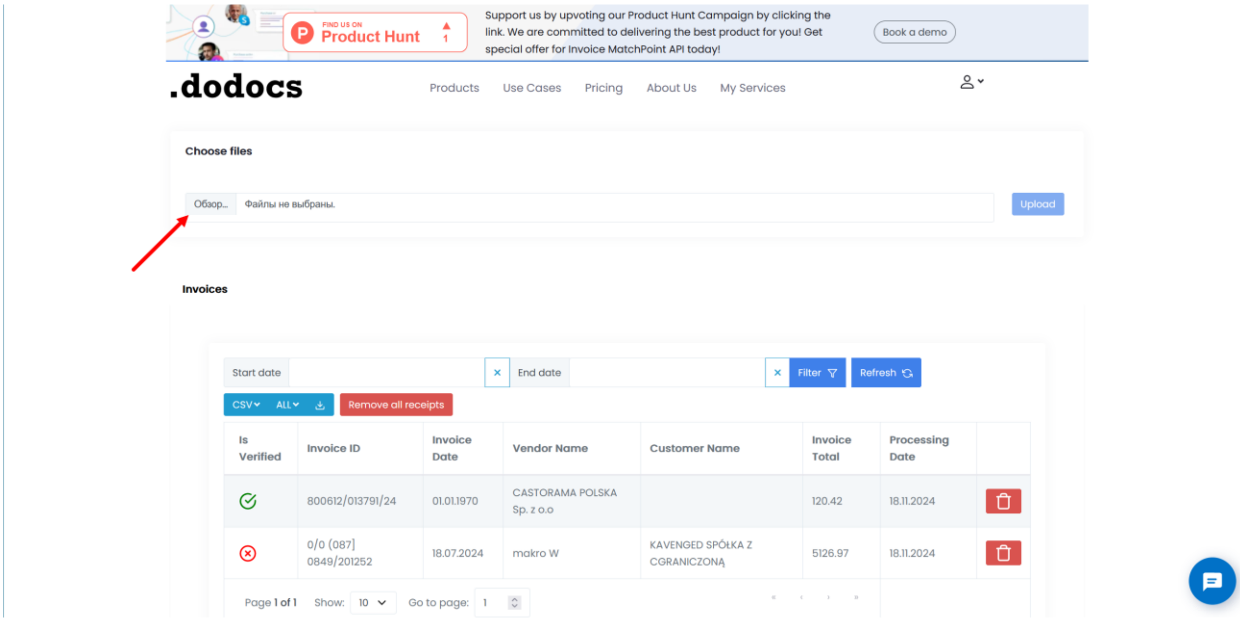


2) You can remove only one receipt by clicking a “trash can” symbol on the right of the receipt. This will delete one file permanently!

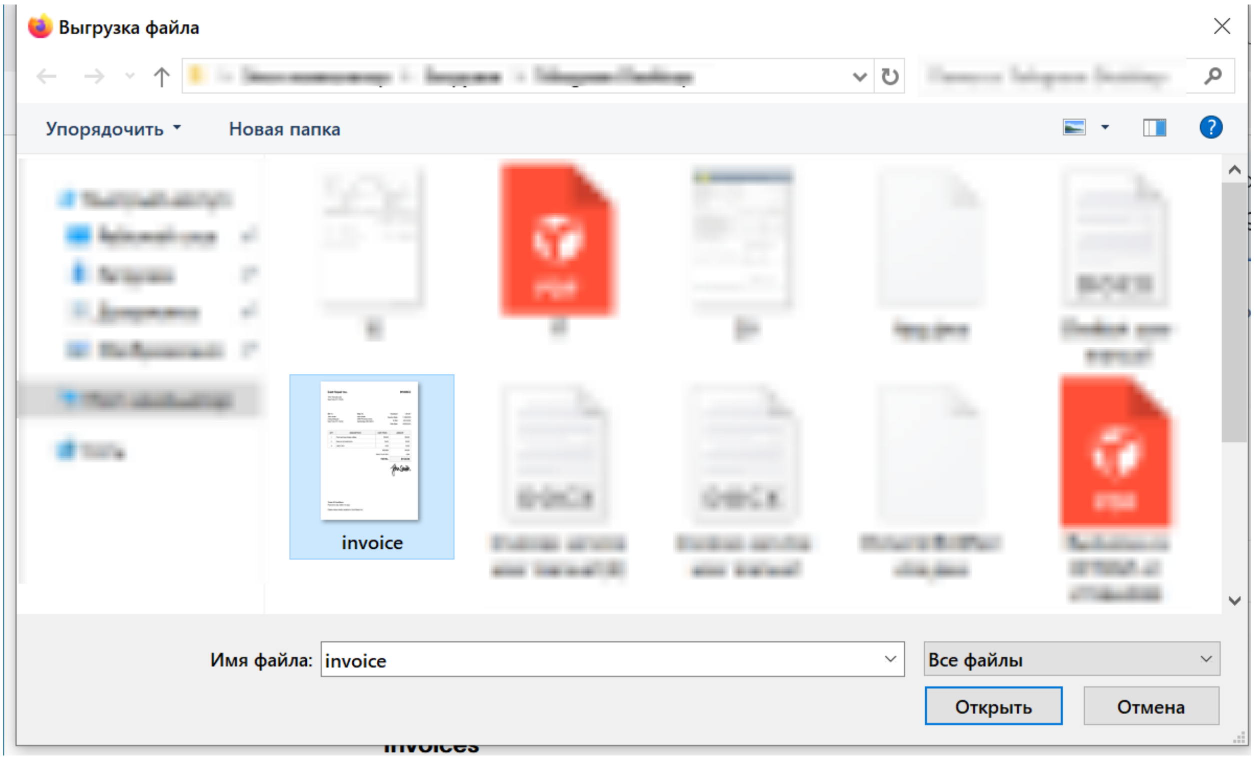


Uploading Files

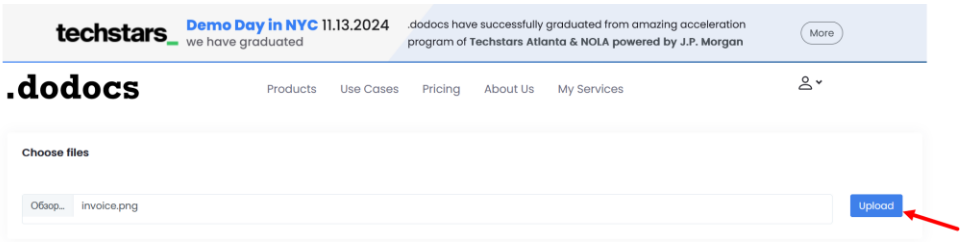
1) To choose files that you want to upload click a gray button on the left in “Choose files” menu.



2) after that a window will open, where you can choose which file to upload. When the file is chosen, click ”Open” button.



3) After that you will see the name of your file in the field. Press an ”Upload” button on the right of the field.



4) The file will be uploaded to Matchpoint. To see the file in the ”Invoices” table click refresh button (1) a few minutes after you uploaded the file. This will allow you to see the file you uploaded (2).