



# Wholesale eInvoicing Technical Guide

## **eInvoicing Technical Guide**

This Technical Guide sets out how you can access and download your using our website portal:

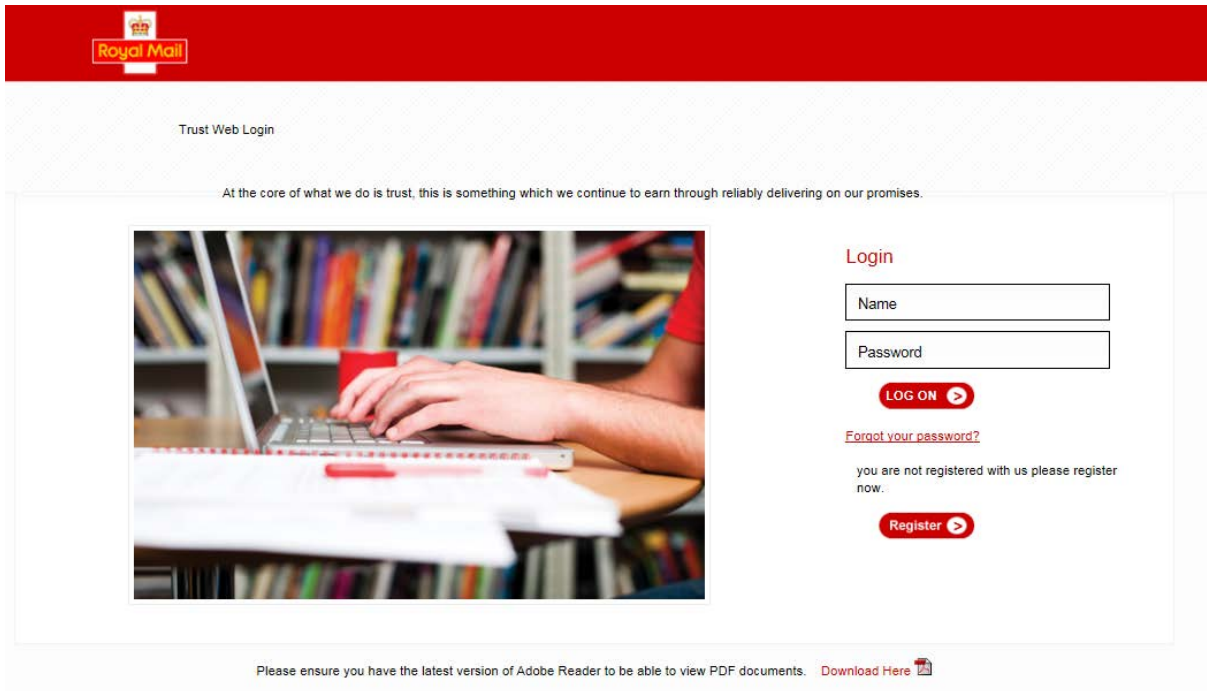
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# 1 Registering on the website portal

STEP 1: Visit <https://www.royalmailwholesale.com/einvoicing/> and click on the [RM Wholesale eInvoicing](#) link.

Figure 1



STEP 2: Select the register button and complete the registration form.

Figure 2

be in touch with your login details.

**Online User Type**  
Your Invoicing Requirements: \*

**Your Login Information**  
Company Email Address: \*   
Password (case sensitive): \*   
Re-type password: \*   
Password Reminder: \*

**Your Name**  
Title: \*   
First Name: \*   
Last Name: \*

**Business Details**  
Position: \*   
Company Name: \*   
Postcode: \*   
Business Phone Number: \*

**Account Details**  
Please add either your Legal Entity number(s) or Account number(s) which you wish to

At the 'Account Details' section add your 10-digit account number and 10-digit legal entity number. If your account number is less than 10 digits please prefix it with a 0. If you are unsure of your account number or legal identity please contact your account director.

Figure 3

**Account Details**  
Please add either your Legal Entity number(s) or Account number(s) which you wish to move to electronic/copy invoicing.

Legal Entity numbers are a Royal Mail generated number to group all your accounts together and can be found on any of your Royal Mail invoices. If you wish to move all your accounts to electronic/copy invoicing, you may find this option more convenient.

Alternatively you may wish to move specific accounts to electronic/copy invoicing, to do this please add each individual account number below which again can be found on your Royal Mail invoices.

1st Legal Entity Number: \*

1st Account Number: \*

We take your privacy seriously. The information you provide through this website will be held under the Data Protection Act 1998. Please read our Privacy Policy.

If you wish to view invoices for more than one account or legal identity please click the "Add Extra Legal Entity" or "Add Extra Account" buttons and fill in your relevant information.

STEP 3: Submit the completed registration form. You will receive an acknowledgement email.

*Figure 4*



### **E-invoicing Registration Complete!**

Your request to use the Royal Mails e-invoicing service has been received and your details are currently being verified. Once your details have been verified, your login details will be emailed to you.

Once your details have been successfully verified, we will notify you by email and provide you with a temporary password for use when you log in for the first time.

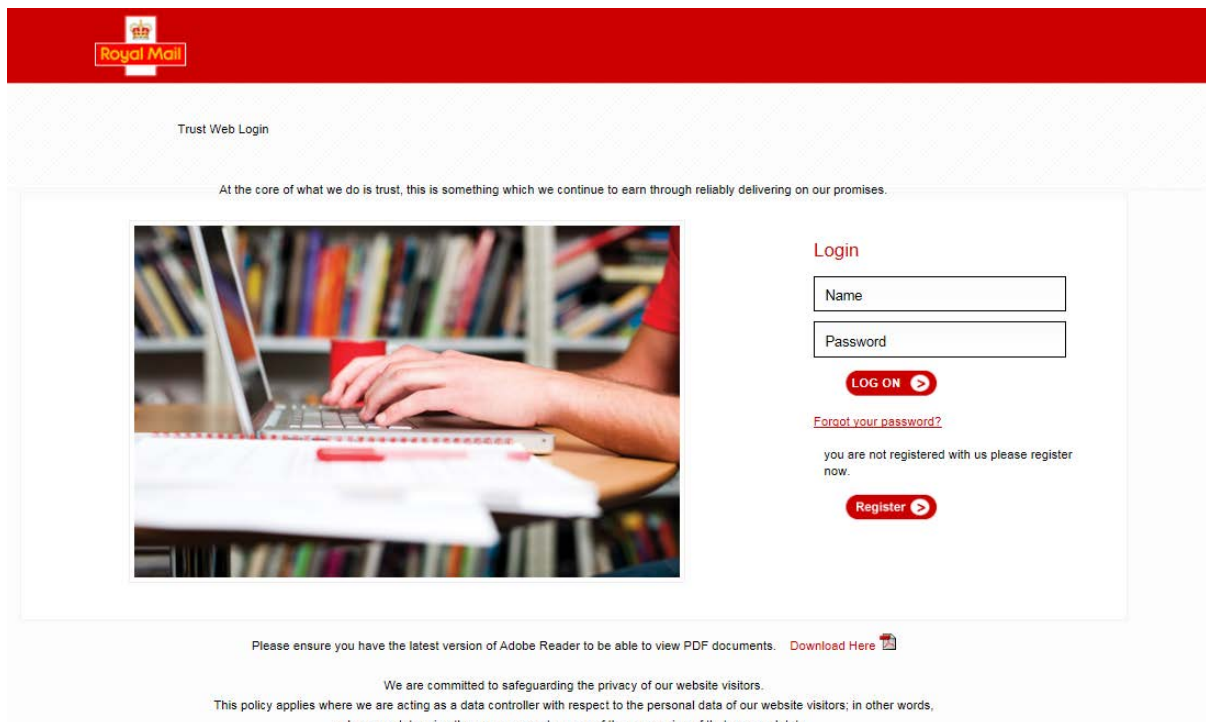
## **1.1 Adding additional accounts to the website portal**

Once your profile has been created on the portal you can request additional accounts to be added at any time. If you email [rmg.e.invoicing@royalmail.com](mailto:rmg.e.invoicing@royalmail.com) and state the legal identities and account numbers that you would like to add then we will set them up on the system for you.

## 2 Logging on to the site

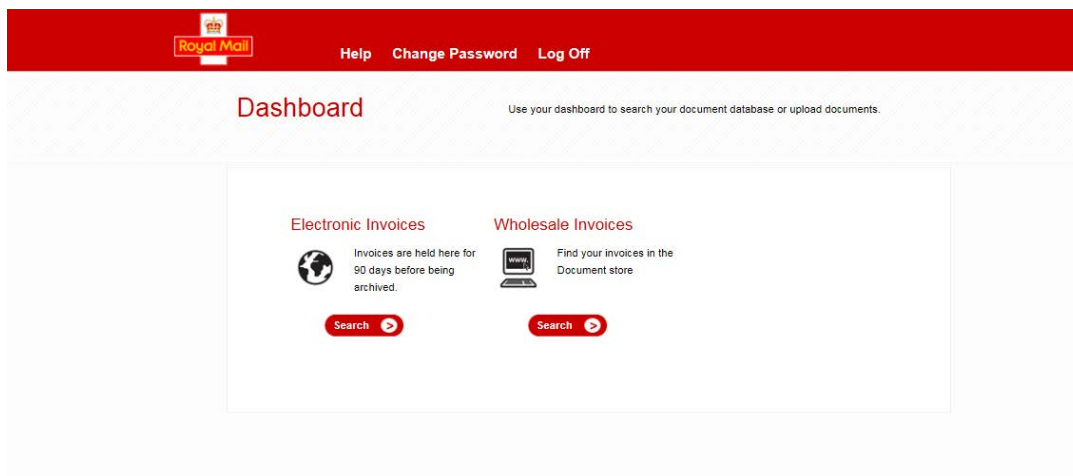
STEP 1: Visit <https://royalmailwholesale.com/einvoicing> and click on the [RM Wholesale invoicing](#) link.

STEP 2: To log in, enter the email address you registered with and your password. If you are logging in for the first time you will need to enter the temporary password which you receive in your registration email. You will then be prompted to change your password. *Figure 5*



STEP 3: Once you have logged into the website you will have access to the following dashboard from which you can access live invoices and copy invoices.

*Figure 6*

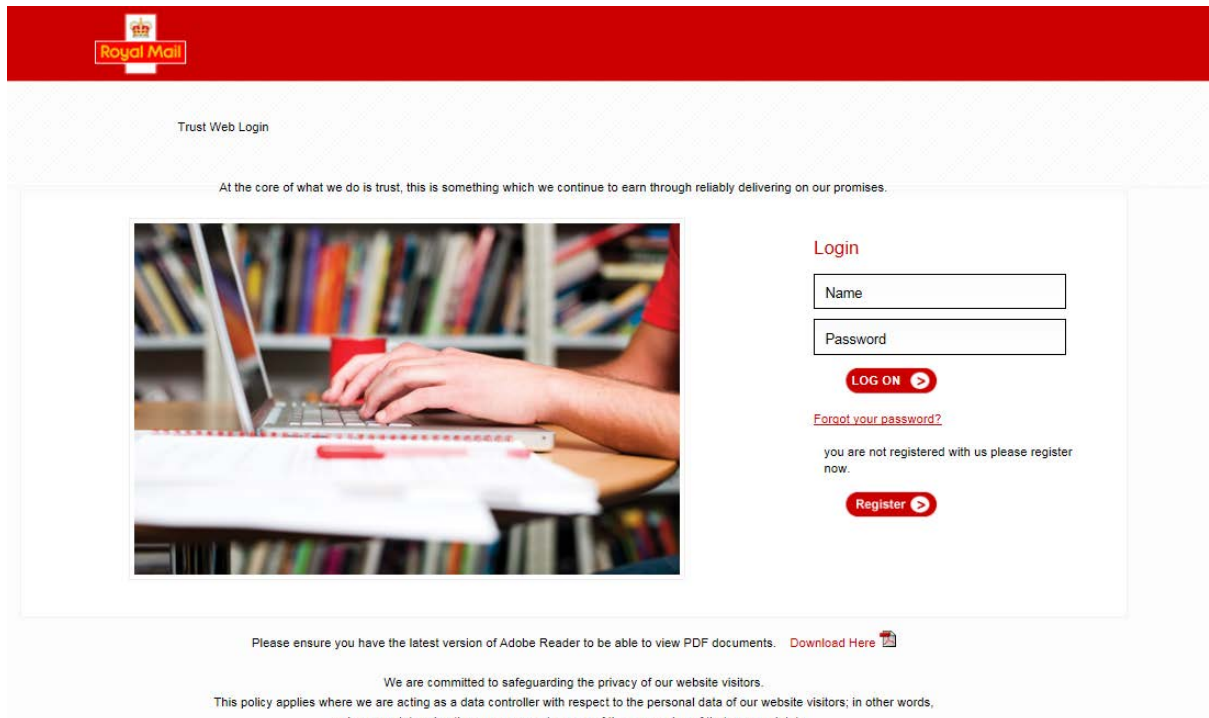


### 3 Forgotten Password

STEP 1: If you forget your password visit <https://www.royalmailwholesale.com/einvoicing/> and click on the [RM Wholesale eInvoicing](#) link

STEP 2: Select the 'Forgot password' link on the login page.

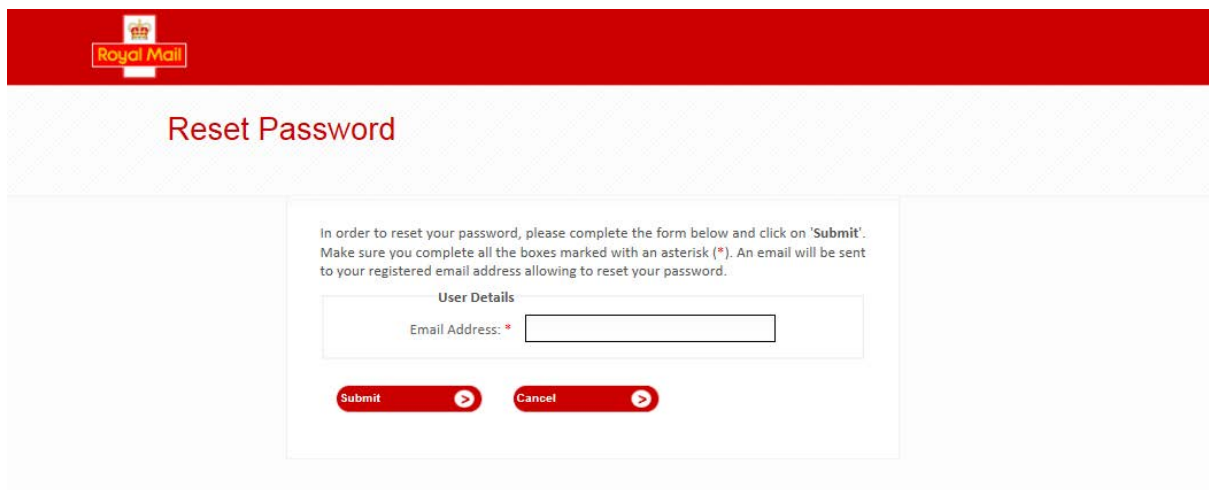
Figure 7



The screenshot shows the Royal Mail Wholesale eInvoicing login page. At the top is the Royal Mail logo. Below it is the text "Trust Web Login" and a paragraph: "At the core of what we do is trust, this is something which we continue to earn through reliably delivering on our promises." To the left is a photograph of a person's hands typing on a laptop. To the right is the login form with fields for "Name" and "Password", a "LOG ON" button, a "Forgot your password?" link, and a "Register" button. Below the form is a note about Adobe Reader and a privacy policy statement.

STEP 3: On the 'Reset Password page' submit your email address.

Figure 8



The screenshot shows the Royal Mail Wholesale eInvoicing "Reset Password" page. At the top is the Royal Mail logo. Below it is the heading "Reset Password" and a paragraph: "In order to reset your password, please complete the form below and click on 'Submit'. Make sure you complete all the boxes marked with an asterisk (\*). An email will be sent to your registered email address allowing to reset your password." Below this is a form titled "User Details" with a field for "Email Address: \*". At the bottom are "Submit" and "Cancel" buttons.

STEP 4: We will send you an email with a password reset weblink which will be valid for 30 minutes. If you do not reset your password within 30 minutes you will need to repeat steps 1 to 3 above to receive a new reset weblink.



## 4 Searching for Invoices


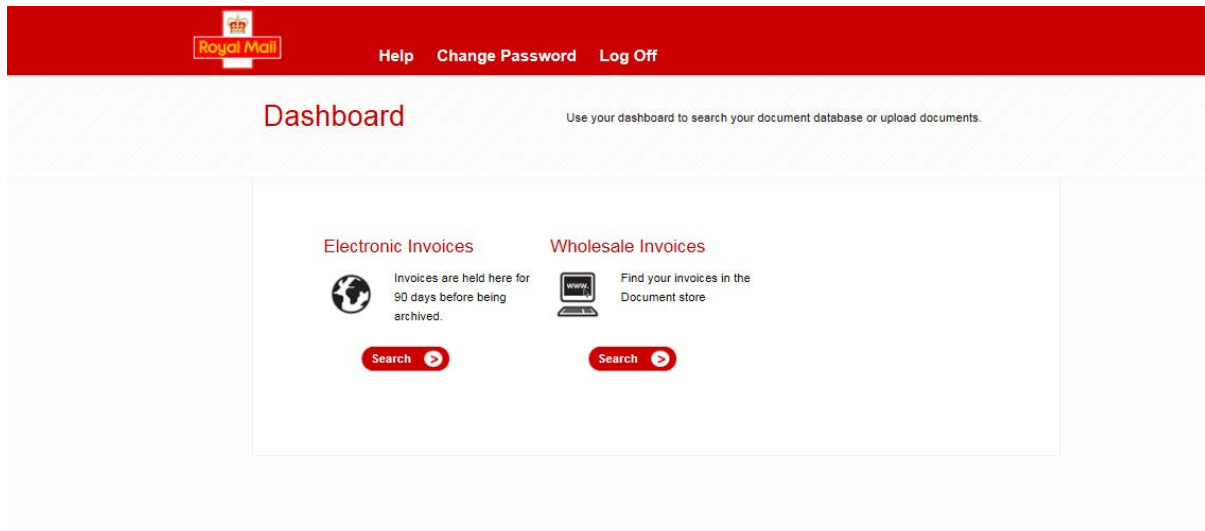
STEP 1: Select the Electronic invoices or Wholesale Invoices  icon from the 'Home' page.

Figure 9



STEP 2: On the 'RM Invoices Search' page enter your search criteria using the search function keys to retrieve the relevant invoice or list of invoices.

Figure 10

Legal Entity	Equals	▼	<input type="text"/>	
Invoice Date	&	Equals	▼	<input type="text"/>
Document No	&	Equals	▼	<input type="text"/>

You will be presented with a list of results, detailing the transactional information for each invoice. If you click the search button it will display all your most recent invoices in date order. You can also do a search by invoice date if you only want to see one invoice.

You can view, print and download invoices in either PDF or CSV formats.

If you have viewed an invoice or downloaded it the number of views will be displayed on the invoice line

Figure 11

Terms	Viewed	Download	Date
14 days	6		



Please note that a copy invoice watermark will be applied to a PDF invoice after the first time you access it.

For archived invoices, every time a PDF is opened a copy invoice water mark is applied to the invoice.

## 4.1 Search by Legal Entity

STEP 1: Enter the legal entity number in the query box and click the **Search** button.

STEP 2: The result of the search shows all the account numbers linked to the legal entity number. Figure 11 illustrates an example that has 18 account numbers linked to the Legal Entity number. You can sort the search results by clicking on the data headers in the toolbar.

STEP 3: You can view the invoices by clicking on the PDF icon  or the CSV icon .


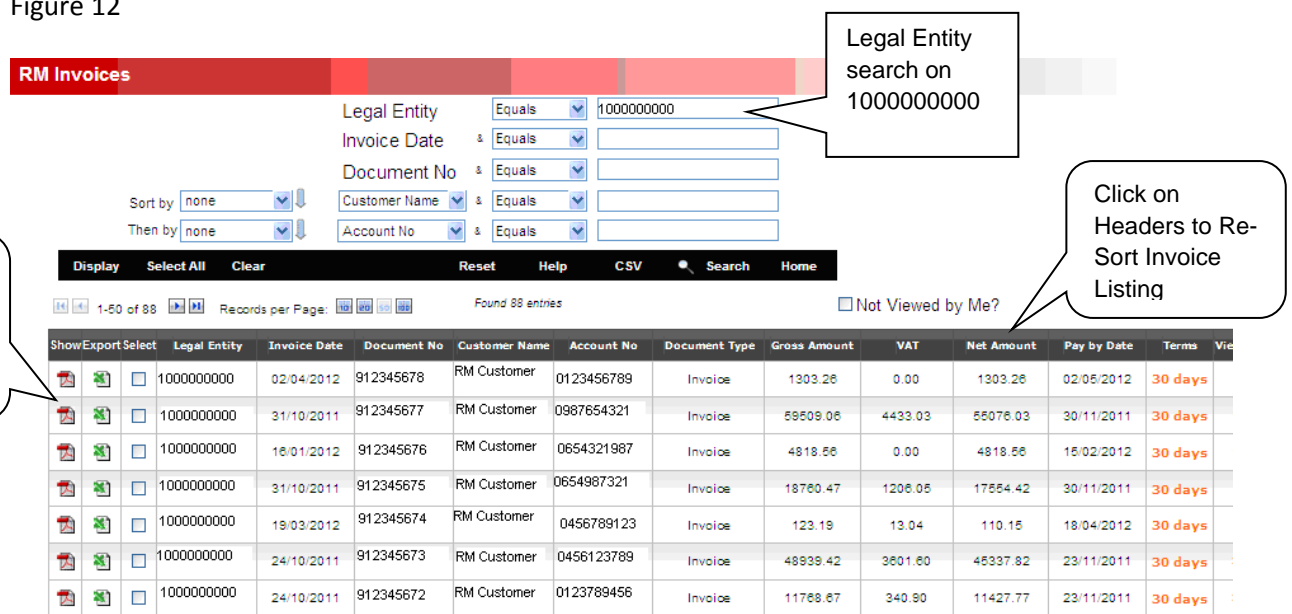
STEP 4: A pop-up window will display the selected invoice in the format you have chosen. You can select to either print  or email it to a contact by selecting 'Page'.

Figure 12



Legal Entity search on 1000000000

Click on Headers to Re-Sort Invoice Listing

Click on PDF to view or Store save data



Show	Export	Select	Legal Entity	Invoice Date	Document No	Customer Name	Account No	Document Type	Gross Amount	VAT	Net Amount	Pay by Date	Terms	View
		<input type="checkbox"/>	1000000000	02/04/2012	912345678	RM Customer	0123456789	Invoice	1303.26	0.00	1303.26	02/05/2012	30 days	
		<input type="checkbox"/>	1000000000	31/10/2011	912345677	RM Customer	0987654321	Invoice	59509.06	4433.03	55076.03	30/11/2011	30 days	
		<input type="checkbox"/>	1000000000	16/01/2012	912345676	RM Customer	0654321987	Invoice	4818.56	0.00	4818.56	15/02/2012	30 days	
		<input type="checkbox"/>	1000000000	31/10/2011	912345675	RM Customer	0654987321	Invoice	18760.47	1206.05	17554.42	30/11/2011	30 days	
		<input type="checkbox"/>	1000000000	19/03/2012	912345674	RM Customer	0456789123	Invoice	123.19	13.04	110.15	18/04/2012	30 days	
		<input type="checkbox"/>	1000000000	24/10/2011	912345673	RM Customer	0456123789	Invoice	48939.42	3601.60	45337.82	23/11/2011	30 days	
		<input type="checkbox"/>	1000000000	24/10/2011	912345672	RM Customer	0123789456	Invoice	11768.67	340.80	11427.77	23/11/2011	30 days	


STEP 5: Once the search has been completed, close down the pop-up window and click on **Reset** on the toolbar to start your next query.

## 4.2 Search by Document Number

STEP 1: Enter the document number in the query box and click the **Search** button.

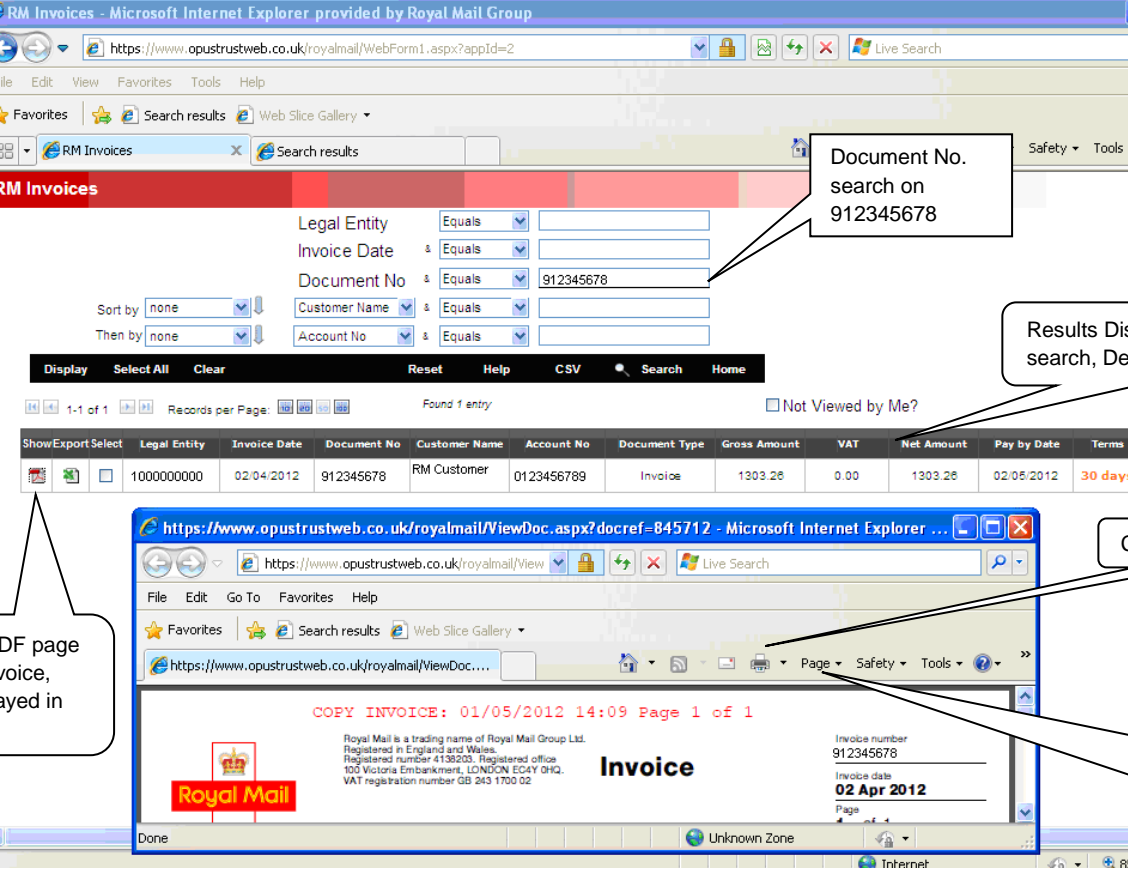
STEP 2: The result of the search is displayed below the toolbar, detailing some basic information from the invoice such as "Customer Name" and "Invoice Value".

STEP 3: You can view the invoices by clicking on the PDF icon  or the CSV icon .

STEP 4: A pop-up window will display the selected invoice in the format you have chosen. You can select to either print  or email it to a contact by selecting 'Page'.

Please follow the same process for accessing issuing copy invoices.

Figure 13



The screenshot shows the 'RM Invoices' search interface in Microsoft Internet Explorer. The search filters are set to 'Document No' equals '912345678'. The results table shows one entry for an invoice dated 02/04/2012 with a gross amount of 1303.26. A pop-up window displays the invoice details, including the Royal Mail logo and invoice number 912345678 dated 02 Apr 2012. Callouts indicate the search process and the options to print or email the invoice.

Show	Export	Select	Legal Entity	Invoice Date	Document No	Customer Name	Account No	Document Type	Gross Amount	VAT	Net Amount	Pay by Date	Terms
		<input type="checkbox"/>	1000000000	02/04/2012	912345678	RM Customer	0123456789	Invoice	1303.26	0.00	1303.26	02/05/2012	30 days

COPY INVOICE: 01/05/2012 14:09 Page 1 of 1	
	<b>Invoice</b>
<small>Royal Mail is a trading name of Royal Mail Group Ltd. Registered in England and Wales. Registered number 4138205. Registered office: 103 Victoria Embankment, LONDON EC4Y 0HQ. VAT registration number GB 243 1700 02</small>	<small>Invoice number 912345678 Invoice date <b>02 Apr 2012</b> Page</small>

STEP 5: Once the search has been completed, close down the pop-up window and click on **Reset** on the toolbar to start your next query.

### 4.3 Search by Customer Name

STEP 1: To search by Customer Name, click on the drop down box below Legal Entity and select Customer Name. If you have a lot of agency customers linked to your invoicing portal you might find this search functionality useful.

STEP 2: Click on the drop down box to the right of the “customer name” drop down, select ‘BeginsWith’ or ‘Contains’ and then type in part of the customer name.

The results will be listed as below, detailing all the accounts that start with or contain the searched name and the related invoices.

Figure 14

The screenshot shows the 'RM Invoices' search interface. At the top, there are search filters for Legal Entity, Invoice Date, Document No, Customer Name, and Account No. The 'Customer Name' filter is set to 'RM Customer'. A callout box points to this filter with the text 'Type in part of the Name'. Below the filters is a toolbar with buttons for 'Display', 'Select All', 'Clear', 'Reset', 'Help', 'CSV', 'Search', and 'Home'. The search results are displayed in a table with columns: Show, Export, Select, Legal Entity, Invoice Date, Document No, Customer Name, Account No, Document Type, Gross Amount, VAT, Net Amount, Pay by Date, and Terms. The table contains 7 rows of invoice data for 'RM Customer'.

Show	Export	Select	Legal Entity	Invoice Date	Document No	Customer Name	Account No	Document Type	Gross Amount	VAT	Net Amount	Pay by Date	Terms	Vi
		<input type="checkbox"/>	1000000000	31/10/2011	912345678	RM Customer	0123456789	Invoice	59509.06	4433.03	55076.03	30/11/2011	30 days	
		<input type="checkbox"/>	1000000000	16/01/2012	912345677	RM Customer	0123456987	Invoice	4818.56	0.00	4818.56	15/02/2012	30 days	
		<input type="checkbox"/>	1000000000	31/10/2011	912345676	RM Customer	0456789123	Invoice	18760.47	1206.05	17554.42	30/11/2011	30 days	
		<input type="checkbox"/>	1000000000	24/10/2011	912345675	RM Customer	0456123789	Invoice	48939.42	3601.60	45337.82	23/11/2011	30 days	
		<input type="checkbox"/>	1000000000	24/10/2011	912345674	RM Customer	0789456123	Invoice	11768.67	340.90	11427.77	23/11/2011	30 days	
		<input type="checkbox"/>	1000000000	19/12/2011	912345673	RM Customer	0789123456	Invoice	8878.79	12.32	8866.47	18/01/2012	30 days	
		<input type="checkbox"/>	1000000000	14/11/2011	912345672	RM Customer	0147258369	Invoice	57.18	7.24	49.94	14/12/2011	30 days	



STEP 3: Once the search has been complete, click on the 'Reset' button on the toolbar to start your next query.

Results all Customers with RM Customer in name

## 4.4 Search by Account Number

STEP 1: Enter the account number in the query box and click the **Search** button.

STEP 2: The result of the search is displayed below the toolbar, detailing some basic information from the invoice such as "Customer Name" and "Invoice Value".

STEP 3: You can view the invoices by clicking on the PDF icon  or the CSV icon . If you are accessing multiple invoices see Section 4.5 below.


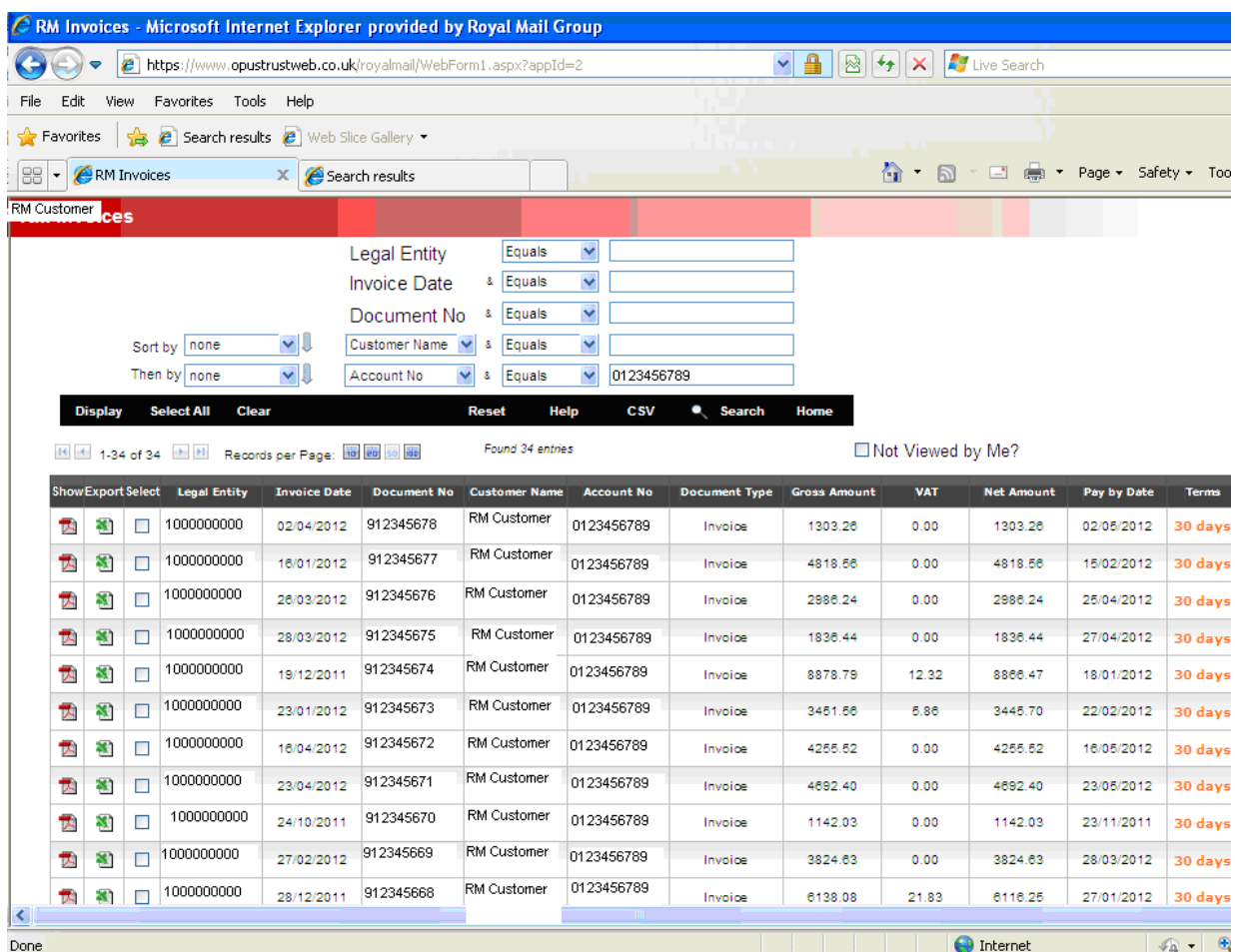
STEP 4: A pop-up window will display the selected invoice in the format you have chosen. You can select to either print  or email it to a contact by selecting 'Page'.

Figure 15



The screenshot shows a web browser window titled "RM Invoices - Microsoft Internet Explorer provided by Royal Mail Group". The address bar shows the URL: <https://www.opustrustweb.co.uk/royalmail/WebForm1.aspx?appId=2>. The browser interface includes a menu bar (File, Edit, View, Favorites, Tools, Help) and a toolbar with icons for Favorites, Search results, and Web Slice Gallery. The main content area displays search filters for "RM Customer Invoices".

Search filters include:

- Legal Entity: Equals [dropdown]
- Invoice Date: & Equals [dropdown]
- Document No: & Equals [dropdown]
- Customer Name: & Equals [dropdown]
- Account No: & Equals [text input: 0123456789]

Sort options: Sort by [none], Then by [none].

Toolbar: Display, Select All, Clear, Reset, Help, CSV, Search, Home.

Page information: 1-34 of 34, Records per Page: [10, 20, 50, 100], Found 34 entries,  Not Viewed by Me?

Show/Export/Select	Legal Entity	Invoice Date	Document No	Customer Name	Account No	Document Type	Gross Amount	VAT	Net Amount	Pay by Date	Terms
<input type="checkbox"/>	1000000000	02/04/2012	912345678	RM Customer	0123456789	Invoice	1303.26	0.00	1303.26	02/05/2012	30 days
<input type="checkbox"/>	1000000000	16/01/2012	912345677	RM Customer	0123456789	Invoice	4818.56	0.00	4818.56	15/02/2012	30 days
<input type="checkbox"/>	1000000000	26/03/2012	912345676	RM Customer	0123456789	Invoice	2986.24	0.00	2986.24	25/04/2012	30 days
<input type="checkbox"/>	1000000000	28/03/2012	912345675	RM Customer	0123456789	Invoice	1836.44	0.00	1836.44	27/04/2012	30 days
<input type="checkbox"/>	1000000000	19/12/2011	912345674	RM Customer	0123456789	Invoice	8878.79	12.32	8866.47	18/01/2012	30 days
<input type="checkbox"/>	1000000000	23/01/2012	912345673	RM Customer	0123456789	Invoice	3451.56	5.86	3445.70	22/02/2012	30 days
<input type="checkbox"/>	1000000000	16/04/2012	912345672	RM Customer	0123456789	Invoice	4255.52	0.00	4255.52	16/05/2012	30 days
<input type="checkbox"/>	1000000000	23/04/2012	912345671	RM Customer	0123456789	Invoice	4692.40	0.00	4692.40	23/05/2012	30 days
<input type="checkbox"/>	1000000000	24/10/2011	912345670	RM Customer	0123456789	Invoice	1142.03	0.00	1142.03	23/11/2011	30 days
<input type="checkbox"/>	1000000000	27/02/2012	912345669	RM Customer	0123456789	Invoice	3824.63	0.00	3824.63	28/03/2012	30 days
<input type="checkbox"/>	1000000000	28/12/2011	912345668	RM Customer	0123456789	Invoice	6138.08	21.83	6116.25	27/01/2012	30 days

STEP 5: Once the search has been completed, close down the pop-up window and click on **Reset** on the toolbar to start your next query.

## 4.6 Selecting Multiple Invoices

STEP 1: Search by Account Number or by Customer Name to retrieve the customer invoices.

STEP 2: Use the **Select All** function from the tool bar or tick the **Select** box next to select each of the relevant document numbers.

STEP 3: Click on the **Display** function on the toolbar to generate the PDF invoice formats. This will combine all selected PDF images into one document. Please note this functionality is not available for CSV

Figure 16

The screenshot shows the 'RM Invoices' web application interface. At the top, there are search filters for Legal Entity, Invoice Date, Document No, Customer Name, and Account No. Below the filters is a toolbar with buttons for 'Display', 'Select All', 'Clear', 'Reset', 'Help', 'CSV', 'Search', and 'Home'. A table of invoice records is displayed below the toolbar, with columns for Legal Entity, Invoice Date, Document No, Customer Name, Account No, Document Type, Gross Amount, VAT, Net Amount, Pay by Date, and Terms. A callout box points to the 'Display' button, and another callout box points to the 'Select All' button. A third callout box points to a preview of a Royal Mail invoice PDF, which is labeled 'COPY INVOICE: 01/05/2012 14:15 Page 1 of 19' and 'Invoice number 9012345678'.

Show/Export/Select	Legal Entity	Invoice Date	Document No	Customer Name	Account No	Document Type	Gross Amount	VAT	Net Amount	Pay by Date	Terms	Vi
<input type="checkbox"/>	1000086000	31/10/2011	9012345678	RM Customer	0123456789	Invoice	59509.06	4433.03	55076.03	30/11/2011	30 days	
<input type="checkbox"/>	1000086000										30 days	
<input type="checkbox"/>	1000086000										0	
<input type="checkbox"/>	1000086000										30 days	
<input type="checkbox"/>	1000086000										30 days	
<input type="checkbox"/>	1000086000										30 days	
<input type="checkbox"/>	1000086000										30 days	
<input type="checkbox"/>	1000086000										30 days	
<input type="checkbox"/>	1000086000										30 days	
<input type="checkbox"/>	1000086000										30 days	
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<input type="checkbox"/>	1000086000										30 days	
<input type="checkbox"/>	1000086000										30 days	
<input type="checkbox"/>	1000086000										30 days	
<input type="checkbox"/>	1000086000										30 days	
<input type="checkbox"/>	1000086000										30 days	
<input type="checkbox"/>	1000086000										30 days	

Click on Select all or click select

Click on Display all to combine all the invoices

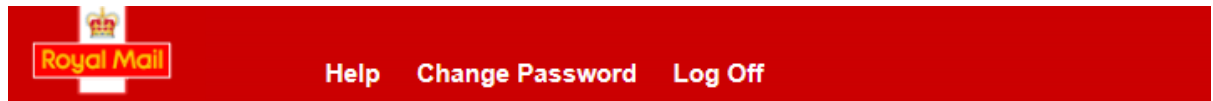
PDF 1 of 19 combined as one Document

## 5 Logging off the system

STEP 1: Select the 'Home' page icon.

STEP 2: Click 'Log Off' on the red title toolbar.

*Figure 17*



STEP 3: Click the 'log off' button.

*Figure 18*

