A guide to using the Wholesale eInvoicing portal

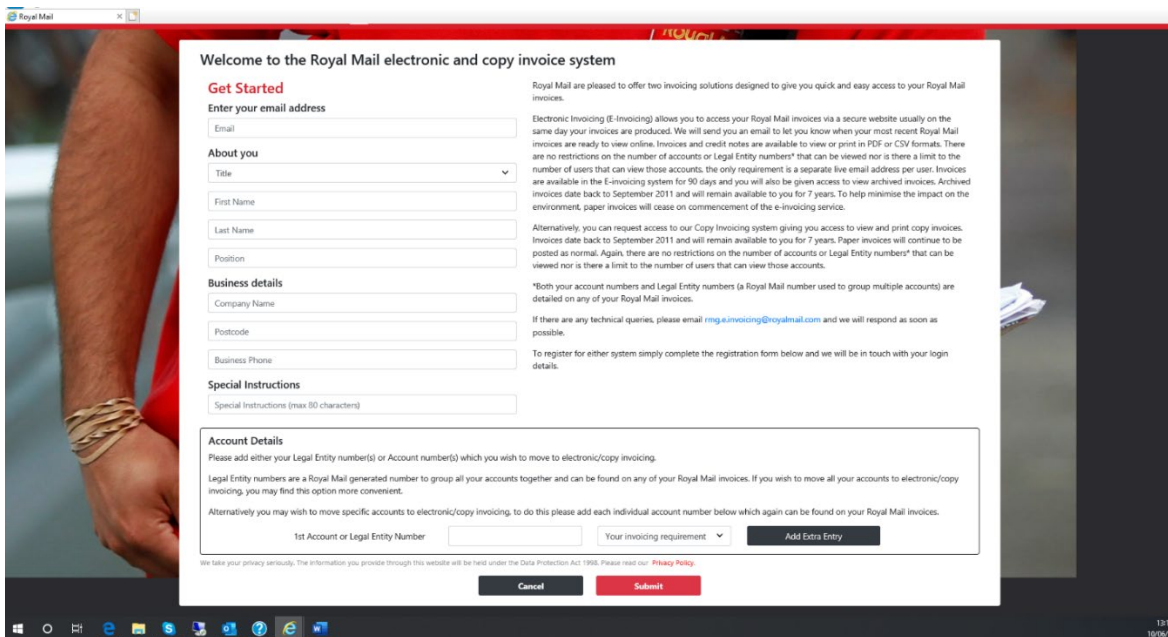*This guide provides guidance and instructions on how to access your invoices, credit notes and other documents.*

Contents

1. Registration process

Visit https://invoicing.royalmail.com/RMWholesale/to register on the eInvoicing portal.

You will need to enter the following information in the fields:

a. **Email** – enter a valid email address.
b. **Title** - select your title from the drop-down menu options;
c. **First name; Last name; position** and **company name;**
d. **Postcode** - only letters and numbers are accepted and a maximum of eight characters.
e. **Business telephone number** – you must enter valid characters (e.g. 0123456789()+)
f. **Special instructions** - This is free-text that will be accessed by the Royal Mail approver.
g. **Account details** – Enter either your legal entity number [1]or SAP Account Number here, and the level of access you would like for each account requested.

You can request access to multiple accounts by clicking the 'Add Extra Entry' button.
The system will ignore any blank 'Account Details' fields.
If the data you enter is correct and valid the field will appear green.
If any of the data you enter is incorrect or invalid the field will appear red. You will not be able to proceed with the registration until you have corrected the information. When you attempt to 'Submit' the registration form, the system will advise you of any field(s) which need correcting.

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[1] Your organisation's legal entity number is issued to you when your Wholesale customer account/s is set up
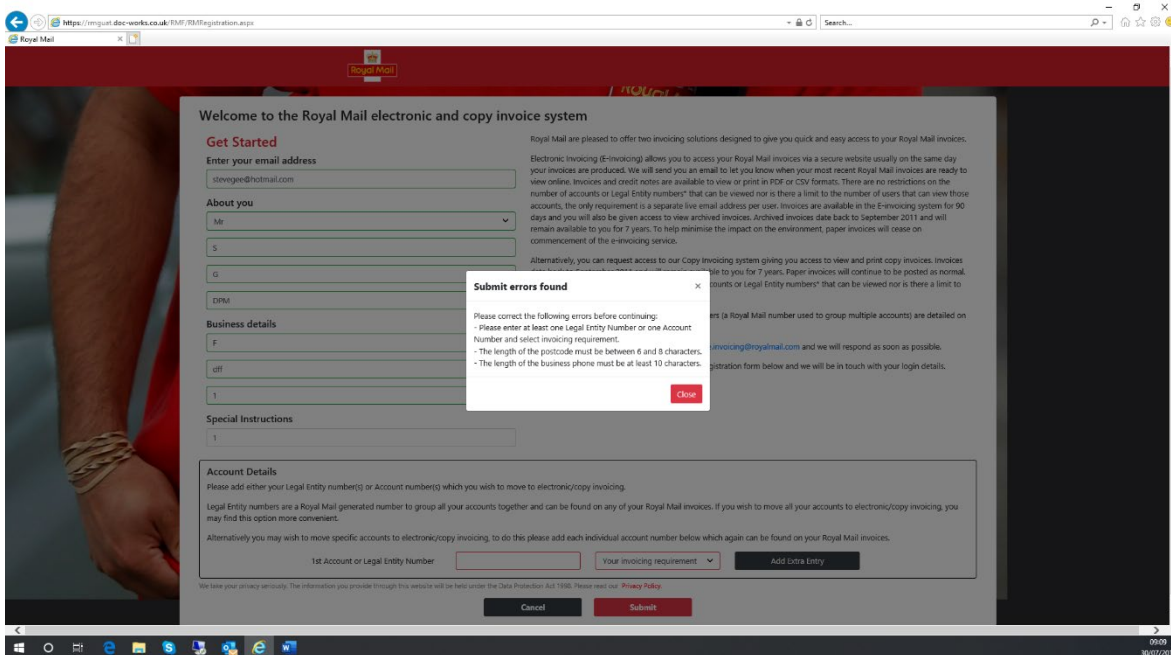
If all fields are valid, the system will return a 'Thank you for registering' message and issue you a Registration ID, which you should record for future reference.
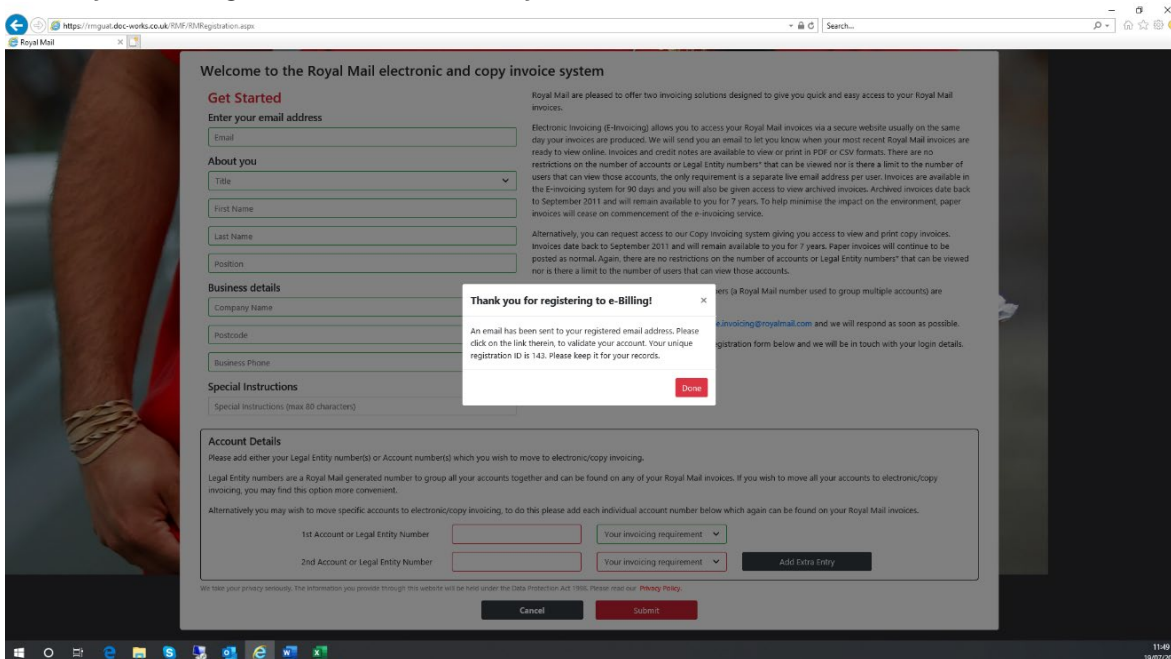

You will receive a 'User Validation' email. In this email is a 'Validate Email Address' button, which when clicked, will confirm to Royal Mail that your email address and request for access are valid.

The link in the email is active for 24 hours. If it expires, you will be required to re-register.
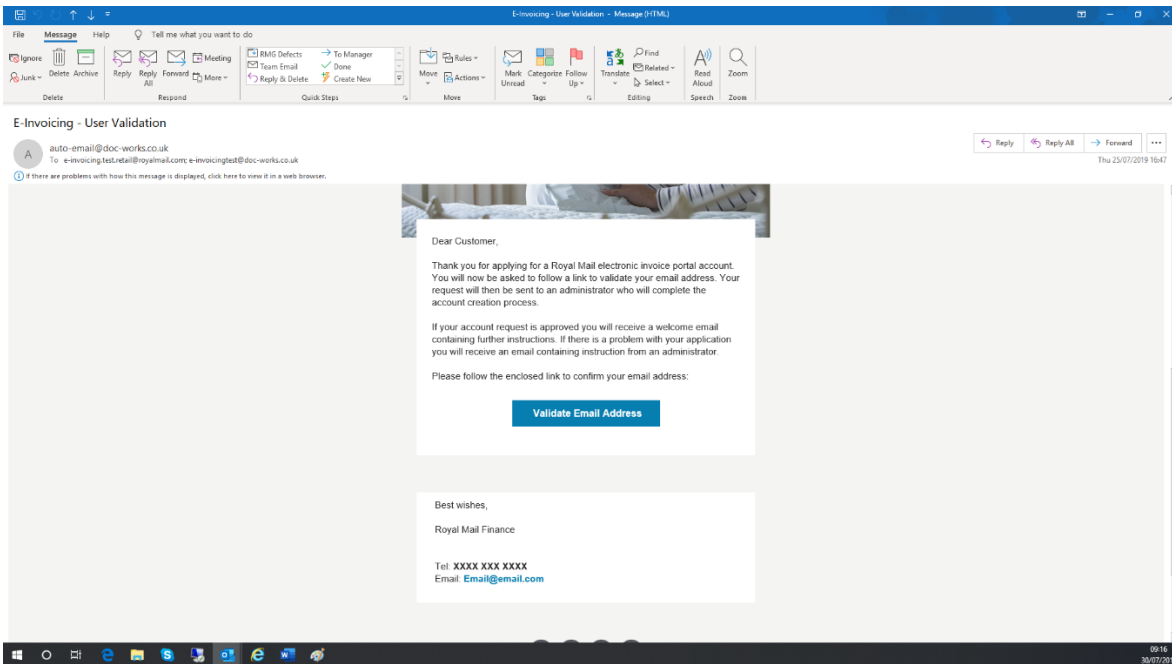
Once you have validated your email address, your registration will automatically be moved to the next stage of the approval process.

Once Royal Mail have approved your request for access, you will receive an email with a temporary password.
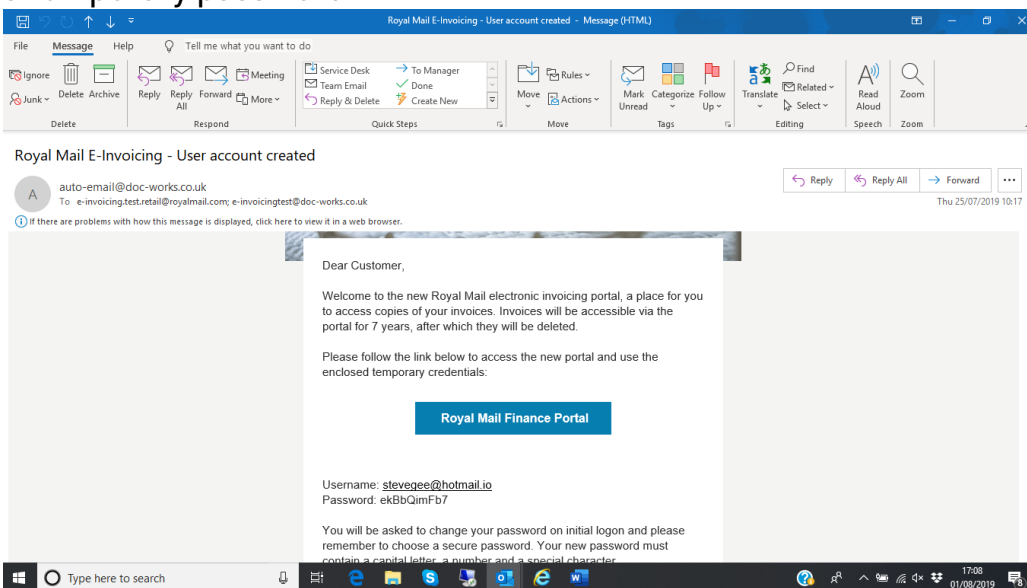
Logging in for the first time

The temporary password is valid for 24 hours. Once you have logged in you will be prompted to change your password. Your new password must be between 8 and 25 characters in length and contain a capital letter, a number and a special character.

Once you have successfully changed your password, you will be automatically directed to the Search/Results landing page.

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, by emailing **rmg.e.invocing@royalmail.com**. You must provide the legal entities and account numbers that you would like to add.

2. Accessing your invoices

This provide guidance on how to access your invoices, credit notes and other documents.

After you have successfully logged in, a results page will be returned with all the documents you are able to view. The most recently uploaded document will be at the top of the results with older documents following in date order.

Clicking on the 📄 will deliver back a PDF view of your document.

Clicking on the 📄 will deliver back a spreadsheet of your document

If you right click in the result table, another menu is displayed where you can;

- a. Display selected documents - highlight multiple rows and view them as a single document.
- b. Save results – save the complete results set into a spreadsheet file for further analysis.
- c. Download documents – download either single or multiple documents in three formats:
  - i. CSV – a comma separated text file with each document on a line;
  - ii. TXT - a pipe delimited text file with each document on a separate line;
  - iii. Spreadsheet – a spreadsheet with each document on its own tab.
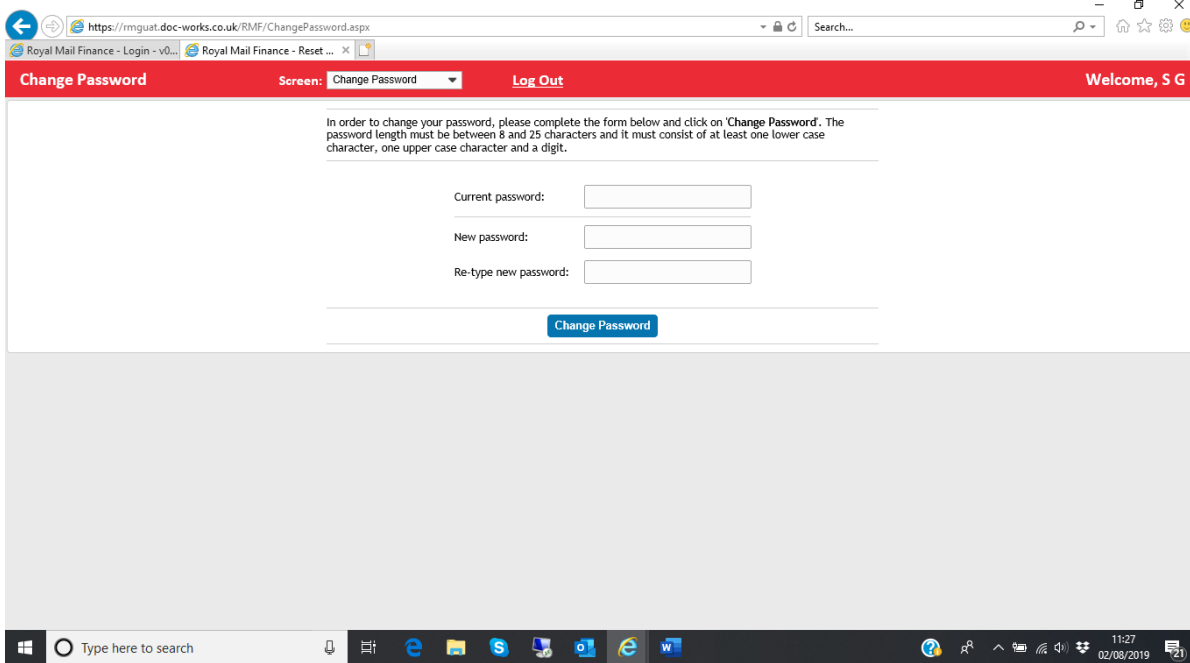- d. View history - see history relating to documents.

3. Searching on the portal

There are ten fields that are you can search against for invoices:

Document No.	The invoice, credit note number of the invoice.
Account No.	Your SAP account number(s).
Legal Entity No.	Your Legal Entity account number(s). Please note, you can only search for account numbers that you have been registered for.
Doctype	This field has an auto-complete function. For example, entering "inv" will bring up. 'Invoice', etc.
Customer	You can search for customer names.
Invoice Date	The date of the invoice must be entered in the format dd/mm/yyyy.
Pay-by-date	The date of the invoice payment must be entered in the format dd/mm/yyyy.
Gross Amount	The gross value of the invoice.
VAT Amount	The VAT amount of the invoice.
Net Amount	The net value of the invoice.

Search criteria

To assist with searching, each field has a set of search criteria that can help you.

Equals	Is the most common criteria used and is will return results that exactly match your entry.
NotEquals	Will return documents that do NOT match the data you entered.
Like	Allows you to search for documents that contain the pattern of the data you entered. Inputting 'Royal' would return both 'Royal Mail' and 'Royal Family'.
In	Here you can search for multiple documents at once. Each item being searched for should be separated by a comma. Eg 12345,23456,34567,45678
IsEmpty	Will return all documents in the selected field that have blank indexes.
List	Similar to 'In'. You can search for multiple documents but this time in list form, as they would be if copiedout of a spreadsheet.
From	Is used in conjunction with 'To' specifically for date ranges and value ranges. When you select 'From' a second box for the 'To' entry will automatically pop-up. Neither field can be left blank

4. Changing your password

Your portal password will expire every 90 days. You will be sent an email when you need to change your password.

You can change your password at any time by selecting the 'Change Password' on the screen dropdown as shown below.

You will need to enter your current password correctly and then enter, and re-enter your new password. Your new password must be different from your current one. It must also conform to the required security standards of being between 8-25 characters in length and contain a capital letter, a number and a special character.

5. Frequently Asked Questions – FAQs

Why can I not log in?
Please check you are entering your email address and password correctly. If your account is locked, you should contact rmg.e.invoicing@royalmail.com.

Why does my search not return any results?
Please check that you are entering your query into the correct field.
Also check that the invoice you are searching for has an account number that you are permitted to view.
Is there another entry in a search field? Try pressing 'clear' and redo your search.

How do I change the order of my search results?
You can click on the column header which alternates between ascending and descending.
You can amend the sort criteria in the sort area as follows:

How do I save the search results set?
When you right-click in the results area you will see a menu with the option to 'Save Results'. This creates a CSV of all results and allows you to open the file in your spreadsheet program.

Can I view more results?
The system has a designed maximum limit of 6000 results for any search.
As standard, these are delivered back in pages of 100 results each. You can change this to up a maximum of 1000 or make it smaller if required. The 'Save Results' function works on the complete results set, not just a single page.

How can I upload the document content into my CRM system?
You have the ability to download documents in either: CSV, comma separated value file, widely accepted as a CRM upload
TXT, a pipe-delimited file. Pipes (|) are easily amended to the delimiter of your choice
Spreadsheet, an MSExcel file which can be uploaded to most systems.