eVISION TECHNOLOGIES

B2B CUSTOMER PORTAL

Open items & Invoice Repository

In their quest to offer greater value to customers, corporations are moving more and more relevant information and processes online. The eVision B2B portal is designed to meet such needs and is the swiftest, most efficient way to fulfil customer queries, provide information and manage business transactions without placing any strain on internal resources.

Thanks to eVision's *Invoice Repository* and the recently added *Open Items* module, corporations may now automatically upload customer invoices, outstanding payments and other customer-related financial data directly to their B2B portal.

Open Items

eVision's Open Items module provides customers with an intuitive accounts summery dashboard. Grouped according to invoice number the various columns indicate the status of each outstanding payment:

- *Amount to expire* – Orders that have been shipped and invoiced, but for which payments are not yet due,
- *Amount under review* – A short term "grace" area for recently expired payments that are not yet considered overdue,
- *Amount expired* – overdue payments,
- *Deferred invoicing* – orders that have been shipped but not yet invoiced.

For additional context customers may click on the invoice number to view and download a PDF copy of the original invoice.

Customer credit limits and financial exposure may also be displayed to provide users with an up-to-date and comprehensive summary of their accounts.

It is also possible to link eVision's credit card payment interface to the open items dashboard, allowing customers who have exceeded their credit limit to settle payments directly within the portal, thus freeing up their credit line for other purchases, such as urgent spare parts orders.

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Open items

Research

Invoice n°	Invoice date	Expiry	Document	Payment	Currency	Amount to expire	Amount under review	Amount expired	Deferred invoicing	Total
PTK2566398	22/07/2021	22/09/2021	Invoice	Bank Trnsfr	EUR	-	-	-	2.500,00	2.500,00
PTK2566399	22/07/2021	22/08/2021	Invoice	LC	EUR	-	-	-	94.000,00	94.000,00
PTK2566401	22/07/2021	22/09/2021	Invoice	Bank transfer	EUR	-	-	-	105.000,00	105.000,00
PTK2566420	15/07/2021	15/09/2021	Invoice	Bank transfer	EUR	550,00	-	-	-	550,00
PTK2566544	15/07/2021	15/09/2021	Invoice	Bank transfer	EUR	6.522,00	-	-	-	6.522,00
PTK2566560	15/07/2021	15/09/2021	Invoice	Bank transfer	EUR	118.245,96	-	-	-	118.245,96
PTK2566601	02/07/2021	02/08/2021	Invoice	LC	USD	225,78	-	-	-	225,78
PTK2566666	02/07/2021	20/07/2021	Invoice	LC	USD	-	59.877,00	-	-	59.877,00
PTK2566691	25/06/2021	20/07/2021	Invoice	LC	USD	-	44.126,00	-	-	44.126,00
PTK2566781	15/06/2021	15/08/2021	Credit note	Bank transfer	EUR	-856,74	-	-	-	-856,74
PTK2566823	15/06/2021	15/08/2021	Invoice	Bank transfer	EUR	4.588,00	-	-	-	4.588,00
PTK2566850	01/06/2021	01/08/2021	Invoice	Bank transfer	EUR	123.695,00	-	-	-	123.695,00
PTK2566899	01/06/2021	01/08/2021	Credit note	Bank transfer	EUR	-45.207,50	-	-	-	-45.207,50
PTK2566999	18/05/2021	18/06/2021	Invoice	LC	USD	-	-	532,00	-	532,00
PTK2567005	18/05/2021	18/06/2021	Invoice	LC	EUR	-	-	30,00	-	30,00
PTK2567059	10/05/2021	10/06/2021	Invoice	LC	EUR	-	-	21.499,00	-	21.499,00
PTK2567077	10/05/2021	10/06/2021	Invoice	LC	EUR	-	-	566,00	-	566,00
PTK2567189	03/05/2021	03/06/2021	Invoice	LC	USD	-	-	49,00	-	49,00
PTK2567320	03/05/2021	03/07/2021	Invoice	Bank transfer	EUR	-	-	78.962,00	-	78.962,00
						207.762,50	**104.003,00**	**101.638,00**	**201.500,00**	**614.903,50**

Credit limit:	800.000,00
Credit exposure:	614.903,50
Remaining credit:	185.096,50

Invoice Repository

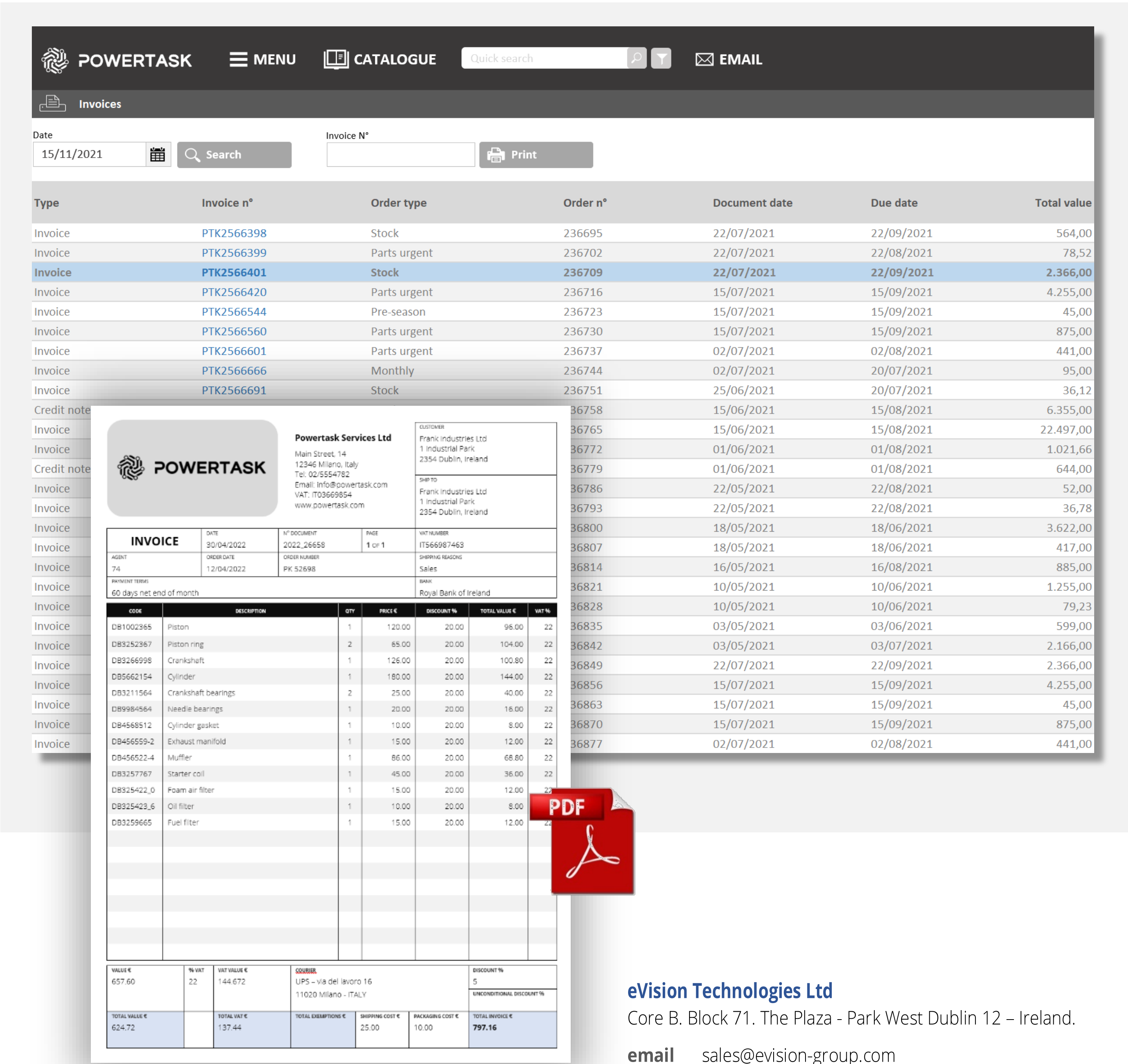
eVision's invoice repository is designed to host a two year range of searchable customer invoices and credit notes.

On their main dashboard customers will find a summary of all their relevant financial documents, which may be recalled, displayed and downloaded with a simple click. The available processes to retrieved data from the corporate ERP and displayed it on the portal are as follows:

- **Offline –** invoice and credit note data is regularly exported and uploaded to the portal. Each successive scheduled export overwrites the previous and updates the repository.
- **Real-time** – A web service may be deployed to query the ERP, an external repository or a document management application and open (and download) a PDF copy of the original invoice or credit note.

Dynamic links may be created for fields displayed in the dashboard (such as order numbers), that are relevant elsewhere in the B2B portal, enabling customers to navigate freely between modules without losing context.

> *From within the invoice repository a customer may click on the order n°, open the order tracking module and inspect the detailed contents of the original order*



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