

# Quick Start Guide Accepting 1<sup>st</sup> Invitation

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### **Getting Started**

Congratulations! You have opted to use Pak Exchange and need to get set up to the Pak Exchange Network to start sending and receiving documents and invoices seamlessly. The #1 way to get set up is receiving an emailed invitation from the purchaser/operator you are associated with.

\*\*NOTE\*\* This e-mail is usually sent to the initial Exchange user, but many users can be added to Pak Exchange along with many other options that will help you succeed with Pak Exchange.

#### Invitation

1. Open the e-mail received. It should look similar to the one below.

PakEnergy
Hi
with with has invited you to use PakEnergy Exchange to collaborate with them digitally. Use the button below to set up an account and get started transacting today:
Set Up Account
If you have problems with the above link, copy the following URL into your browser: https://uat.docvueexchange.com/register/7ae89eeb-9485-41c7-8e33-52a0ad951884
Need help getting started? Check out our Help Documentation about getting started
FAQ What is PakEnergy Exchange? PakEnergy Exchange is a platform for exchanging various types of documents digitally through the Internet. It aims to speed up the process of transmitting those typically paper based documents to ensure you have the most accurate information at your finger tips at all times
Why am I receiving this invitation? The reason you are receiving this invitation is because has indicated that they do business with you, and would like to start exchanging documents digitally with you and your company
How should I proceed? Signing up is a simple, straight forward process comprised of a couple of steps:
<ol> <li>Click the Set Up Account button above</li> <li>Enter some basic information about your company such as your name, address, etc.</li> <li>Enter some information about your initial Admin user - don't worry you can have more than one or change it later</li> <li>Accept the invitation from the second se</li></ol>
<b>I'm having problems signing up, how can I get assistance?</b> Check out our comprehensive <u>Help Documentation</u> to answer all of your questions or concerns about signing up with PakEnergy Exchange

2. After clicking the "Set Up Account" button from the e-mail, you will be redirected to the Pak Exchange registration page.

<u>\*REMEMBER\* It is essential to use the SPECIFIC "Set Up Account" link included</u> in the e-mail received. Failure to use this link could result in a failed connection between the two parties.

## **Setup & Connection**

#### Setup

These next steps will complete the Setup and Connection process for the Pak Exchange Network.

- 1. Enter Sign up information beginning with your company's "Legal Name" or your individual's "Legal Name."
  - i. Please ensure that the "Legal Name" entered during the sign-up process is the Legal Name as it relates to the IRS-issued Tax Identification Number. (TIN).
  - A Tax Identification Number (TIN) is assigned by the IRS (Internal Revenue Service) and is reflected on such IRS Form(s) as a 1099 and W-2.
  - iii. As a **Business**, the Legal Name will be the Legal Business Name associated with the Employer Identification Number (EIN) assigned by the IRS on Form SS-4.
  - iv. As an **Individual**, the Legal Name will be the Full Name of the person associated with the Social Security Number (SSN) assigned by the IRS on your personal Social Security Card.

\*\*Why is this step so important? \*\* The Legal Name and Tax ID are just a couple of the factors used by Pak Exchange to differentiate between parties. Please ensure this information is correct (as recorded with the IRS) and consistent with what is provided to the inviting party.

3. Please notice that the "Submit" button is not blue because all information has not been filled out. Once the "Submit" button is blue – click "Submit" to create the company and the administrative user on the Pak Exchange network.

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\*\*NOTE\*\* All information is required and must be filled in. If all the information is not filled in, you cannot proceed to the next steps. You will know if all required information is filled in when the "Submit" button turns gray to blue.

\*\*SPECIAL NOTE\*\* The e-mail address that is entered at the time of signup can be different than where the invitation e-mail was sent. The e-mail address that is used at the time of sign-up is going to be the username going forward. If by chance the user has previously created a setup, they cannot create a second account using the same e-mail address and should contact support.

4. Clicking submit will also send an e-mail to the administrative user.

5. At this time, please check the e-mail used to sign up for Pak Exchange for an e-mail from <u>notifications@email.pakenergy.com</u> – titled "Change Password Request" from **Wolfepak Exchange.** 



The administrative user should click on the URL link that is provided in the e-mail, "Password Change Request." This URL will be in blue with the words <u>confirm the</u> <u>password change</u>. Clicking this link will take the administrative user to a PakEnergy Change Password screen.

- The new password about to be created must be at least 8 characters in length and should also contain the following:
  - a. Lowercase letters (a-z)
  - b. Upper case letters (A-Z)
  - c. Numbers (0-9)

	Change Password	At least 8 characters in length
	Enter a new password for	Should contain: Lower case letters (a-z) Upper case letters (A-Z) Numbers (i.e. 0-9)
₿	your new password	
۵	confirm your new password	

6. Once a password is created, with the specified requirements, the following screen that appears is the End User License Agreement (EULA). The EULA needs to be accepted. If the EULA is not accepted, access will not be granted to the Pak Exchange Network.



\*\*NOTE\*\* If the End user License Agreement does not automatically pop up, please hit your F5 key to refresh the browser and log in again.

- 7. Click the blue "Accept" button. After the EULA is accepted, you will be directed to your home dashboard.
- 8. At this time, it is recommended that the Pak Exchange URL be favorited or bookmarked for easy access in the future. URL: <u>https://docvueexchange.com</u>

\*\*NOTE\*\* Using Google Chrome and Firefox for complete Pak Exchange visibility is recommended. Edge is not supported by Pak Exchange.

9. A pop-up box will appear titled "Welcome to DocVue Exchange." This is where you can either select "Take Me There" or "Skip for Now." For this training, we are going to "Skip for Now."

10. Click on the "Skip for Now" button.

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	2. Search all documents	- Pak	Energy	
A	Home	★ Welcome to DocVue Exchange		
\$	Setup	To get started, please review your third-party connections on the left under Parties and once connected you'll be able to see the documents available to you.		
0	Org Unit			
BBn	Address Sets			
•	Users			
	Parties	Welcome to DocVue Exchange		
0	Instations	Welcome to DocVue exchange Would you like to take a moment to upload your Company Logo, W0 and Insurance Certificate? Do not show this message again TAKE ME THERE SKIP FOR NOW		
			1 Partie	ste

\*\*NOTE\*\* Company Logos and other Documentation can be added at any time. For instructions on how to add your company logo and other documentation, please see our Quick Reference Guide on Freshdesk. <u>How to Add a Company Logo, W9 & Certificate of</u> <u>Insurance</u>

- 11. After clicking on the "Skip For Now" button, navigate to the left-hand side of your screen and click on "Invitations."
- 12. After clicking "Invitations," find the invitation your company wishes to accept. If you are following along with this training from the beginning, the customer who sent your company an invitation to connect with the Pak Exchange will automatically appear.
- 13. From this screen, there are options to "Accept" or "Reject" the invitation.

\*\*NOTE\*\* Rejecting an invitation from anyone wishing to connect with you means that you will not be able to submit or receive any documentation.



- 14. For this training and documentation, we will only discuss the "Accept" option. When ready, click the "Accept" button.
- 15. Clicking "Accept" will bring up a box that will provide options to "Create a new party" or "Select existing party."

\*\*NOTE\*\* DO NOT USE the "Select existing Party" option for the first setup. If you have questions about this option, please contact the Pak Exchange support team.



• "Create a new party" provides the option to enter a number or a name used to identify the Party in your accounting records. If this is not a requirement, create a description that describes this connection.

A	Home	
8	Invoices	Accept Invite
	1099s	Accept Invite Enter how you want this invitation Create new party to be described or use your
÷	Setup	Purly Number Accounting System's guidelines
0	Org Unit	PakEnergy Training Company
ů.	Address Sets	Click the "Accept" button after
•	Users	you have finished describing this
	Parties	connection
	Invitations	
	A Home	CANCEL ACCEPT
	E Invoices	Accept Invite
	1099s	
	🔅 Setup	Create new party Party funcer
	Org Unit	Pat/Energy Training Company
	Hin Address Sets	
	Users	
	Parties	Accept
	Invitations	By clicking continue, you agree that you have done any applicable due disperce specific to your company
		PREVENUE SECT policies relevants discussing documents from CANCEL ACCEPT

16. Once the "Invitation" has been accepted, to make sure that there was a successful connection, you can navigate back to "Parties" on your left-hand menu and look for the "Connected" icon on the right-hand side.

\*\*For more training on how to use the Pak Exchange Network, please view our additional training documents and videos found on Freshdesk. <u>FreshDesk Training</u>\*\*