



# Quick Start Guide

## Accepting 1<sup>st</sup> Invitation

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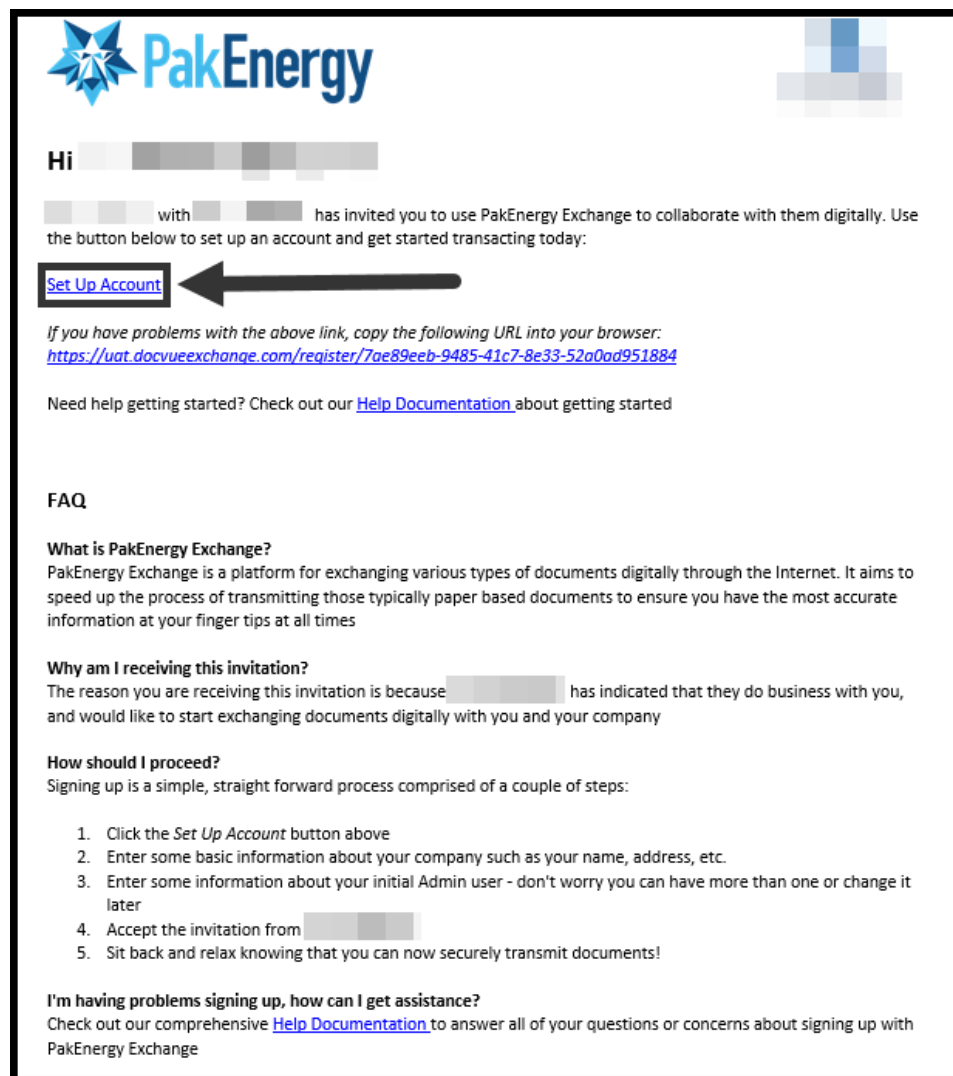
# Getting Started

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.



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

**\*REMEMBER\* It is essential to use the SPECIFIC “Set Up Account” link included 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).
  - ii. 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.**

- 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.

Already have an account? [Login instead](#)

### Sign Up

#### Company Details

Legal Name  
PakEnergy 9 / 255

Address Line One  
500 Chestnut St 15 / 255

Address Line Two  
Ste 500 7 / 255

City  
Ablene 7 / 255

State  
Texas 7 / 255

Zip Code  
79602 5 / 10

**Tax Identification Number**  
Required 0 / 255

#### Administrative User

First Name  
Example 8 / 255

Last Name  
User 4 / 255

Email  
example@email.com 28 / 255

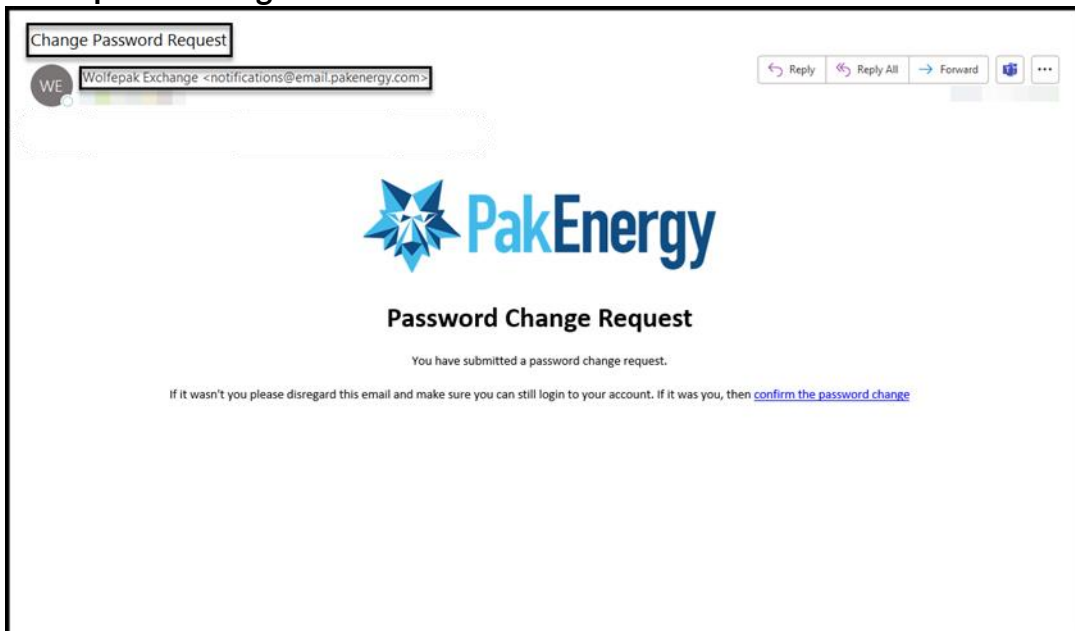
SUBMIT

**\*\*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.

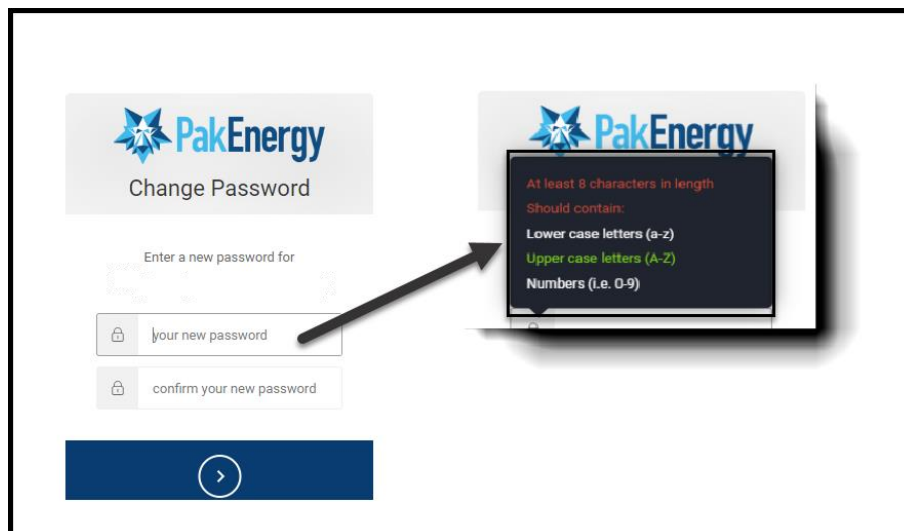
- Clicking submit will also send an e-mail to the administrative user.

5. At this time, please check the e-mail used to sign up for Pak Exchange for an e-mail from [notifications@email.pakenergy.com](mailto:notifications@email.pakenergy.com) – titled “Change Password Request” from Wolfepak Exchange.

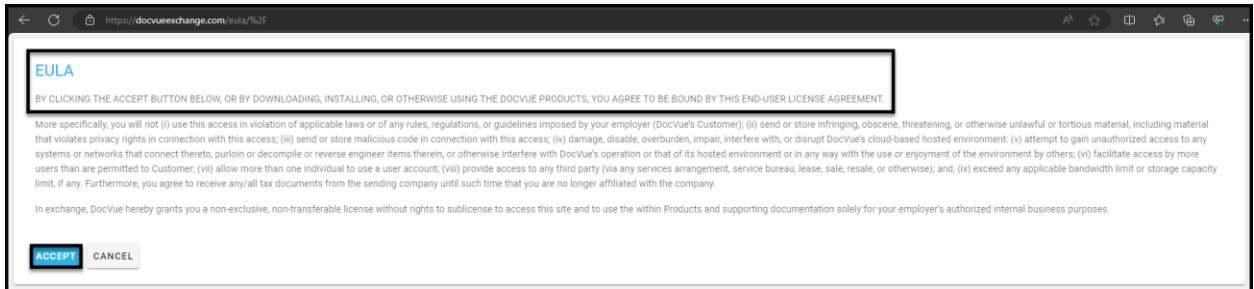


The administrative user should click on the URL link that is provided in the e-mail, “Password Change Request.” This URL will be in blue with the words [confirm the password change](#). Clicking this link will take the administrative user to a PakEnergy Change Password screen.

- 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)



- 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.

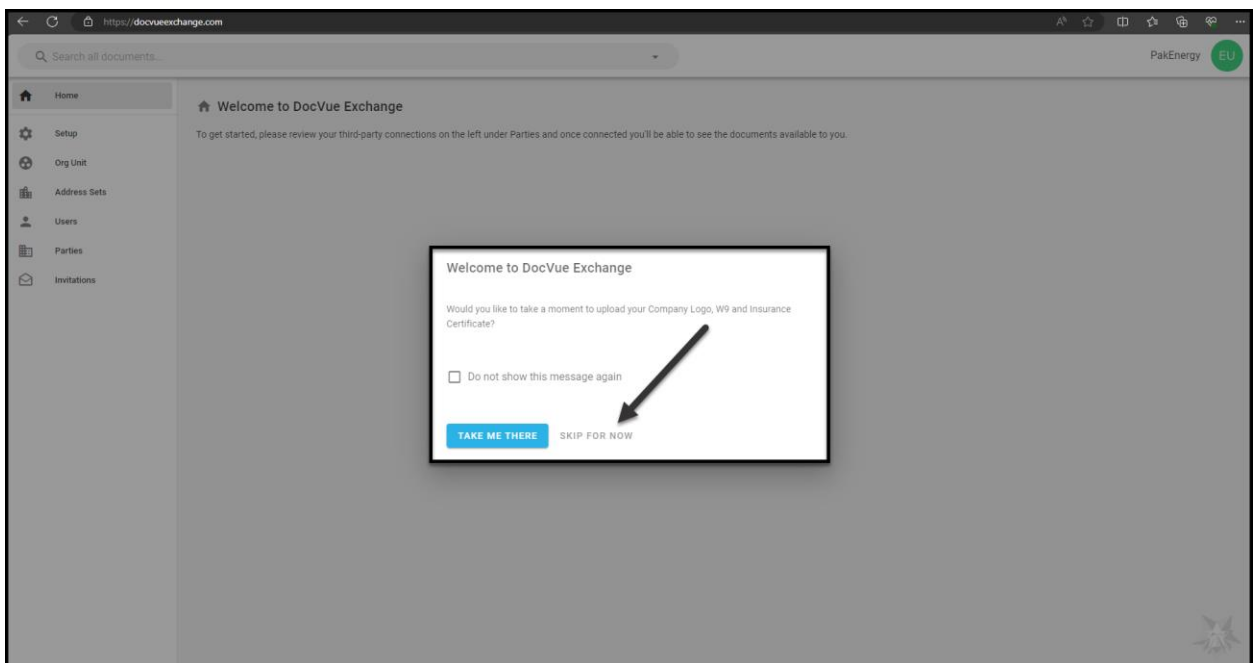


**\*\*NOTE\*\*** If the End user License Agreement does not automatically pop up, please hit your F5 key to refresh the browser and log in again.

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

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

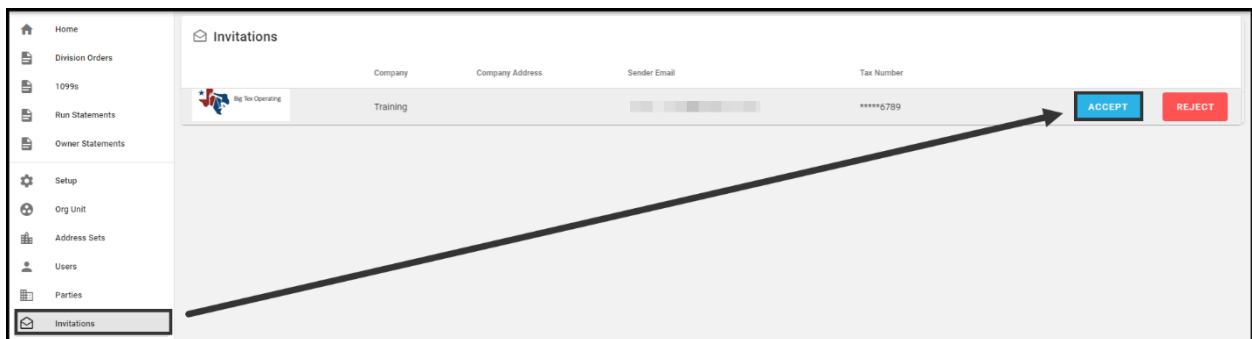
- A pop-up box will appear titled “Welcome to DocVue Exchange.” This is where you can either select “Take Me There” or “Skip for Now.” For this training, we are going to “Skip for Now.”
- Click on the “Skip for Now” button.



**\*\*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. [How to Add a Company Logo, W9 & Certificate of Insurance](#)

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.**



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. [FreshDesk Training](#)\*\***