

User role overview

The portal view is filtered based on your entity restrictions and your user role restrictions. This means that the same portal view is used for all but depending on your entity and user role some views and features are hidden.

We have defined the following user roles:

- Super admin
- Admin
- Employee plus
- Employee
- Customer

We have defined the following entity filters:

- America
- Belgium
- France
- Luxembourg
- Marvi
- Portugal
- Spain

Please see the overview below which shows the difference access rights between user roles. Y, means Yes and that you have access to this tab. N, means No and that you do not have access to this tab. Within a tab there can also be certain restrictions. The only difference between the entity restrictions are the entities that you see and the option of channels that you see within the search and filter options.

User role (roles are also filtered based on entity restrictions)	Super admin	Admin	Employee plus	Employee	Customer (grouped based on bill to and not entity)
Account creation	N, default	Y, portal	Y, portal	Y, portal	Y, batch process based on unique bill to number
Multiple entities	Y	Y	Y	1 only	Y, based on bill to number
Access to invoices tab	Y	Y	Y	Y	Y
Restrictions invoices tab	N	N	Y, no metadata	Y, no metadata	Y, no metadata and less columns
Access to accounts tab	Y	Y	N	N	N
Restrictions accounts tab	N	Y, can only create user within your entity	-	-	-
Access to my accounts tab	Y	Y	Y	Y	Y
Restrictions my accounts tab	N	N	N	N	N, different options for the customer
Access to reporting tab	Y	Y	Y	N	N
Restrictions reporting tab	N	N	N	-	-
Access to history tab	Y	Y	N	N	N
Restrictions history tab	N	N	-	-	-
Access info tab	Y	Y	N	N	N
Restrictions info tab	N	N	-	-	-

Please find below a summary of the main restrictions and difference between the user roles.

User role admin and super admin

- The admin user sees all columns and all tabs.
- The admin user also has the right to create and delete admin and employee users
- An admin could have access to multiple entities
- By default the view between admin users from entities is the same with the only differences:
 - Invoice type and csv download is only applicable for France
 - Your option in the channel dropdown list are depended on the options from the entities.
 - Example:
 - France is: portal, print, cegedim, chorus, email
 - Spain is: portal, print, face, efect, email

User role employee plus

- The employee plus does not have access to the accounts
- The employee plus does not have access to the info tab
- The employee plus does not have access to the history tab
- The employee plus does not have access to the metadata on the invoice tab
- The employee plus is NOT restricted to one entity

User role employee

- The employee does not have access to the accounts
- The employee does not have access to the info tab
- The employee does not have access to the history tab
- The employee user does not have access to the metadata
- The employee user is restricted to one entity

User role customer

- The customer role only has access to the tabs documents and his profile
- The main difference between the customer for France and Spain for example are the CSV download which are only applicable for the YMI0 invoice types and for the SFA entity
- A customer only sees the invoices that are processed within a sales org and that belong to have bill to number
- Same information to double check is shown but does not make sense as a search field
- A customer can only download an invoice from the portal once without DIPLCATE watermark
- All invoices for every channel can be downloaded via the portal

Portal

KONE has a custom portal in the look and feel of KONE. The portal has the KONE logo as a default in the top left and uses the KONE color blue for the buttons and icons. One portal is shared with different entities and different user roles, the view and option within the portal vary and adjust based on the entity and user role. The portal offers the following functionalities:

- Login page
 - Username
 - Password
- Password reset flow
- Invoice tab that shows all documents based on an entity level or bill to level with search and filter options
- Accounts tab that shows all created and active account within the portal plus gives the option to create new admin, employee and employee plus accounts. User accounts can only be created via the batch process.
- My account tab that shows your personal profile settings based on your username login. Here you can also change your profile settings or as a customer change your delivery method
- Reports tab that gives you the option to create
- History tab that shows the full history of customer decisions and usage within the portal
- Info tab that offers the option to upload PDF attachments to the info button or terms and conditions.

Login

The KONE customer logs in by means of his username (corporate mail address for internal users and the bill to number for customers) and created password (created after activating the welcome message mail link).

The login page of KONE E-Invoicing is entered via the following URL:

<https://secure2.anachron.com/kone/login>

The expiration time with respect to an online session is 30 minutes. If there are no activities being detected during this amount of time, the user will be automatically logged out. If the session has expired and the user shows some activity, a message will be shown the session has expired. The user has to log in again via the E-Invoicing login page.

If the user enters an incorrect password for three times in a row, its account status will change from 'active' to 'locked' automatically. The user is not able to login anymore.

The following message will be shown then:

- “Your account is locked. Please use the ‘password forgotten’ link to request a new password”.

Please see the login page screenshot below for a visualization:

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English Help

Version: 2.0.0.4 - 15.04.2017

Login

Username

Password

Forgot your username?

Forgot your password?

Password forgotten

When a user has forgotten his/her password, a new user password can be requested via the 'password forgotten' link. When a KONE E-Invoicing portal user clicks the „forgotten password” link on the login page then a pop-up appears asking the user to provide the login name (corporate email address or bill to number and his portal email address). In addition, a CAPTCHA (‘Completely Automated Public Turing test to tell Computers and Humans Apart’) needs to be passed as well for security reasons. After completion it is checked by the Order2Cash systems if the data entered are valid. If they are, the message is displayed that a mail has been sent. The user will receive an Email that contains a text and an additional link with a security token required for login (just like the welcome message). The procedure is then the same as for clicking the link in the welcome message: the user can enter a new password. If however the data entered are invalid NO Email will be sent, but the portal will still show a message that it has been sent. This is part of the security measurements, making sure that as less information as possible is provided in these cases

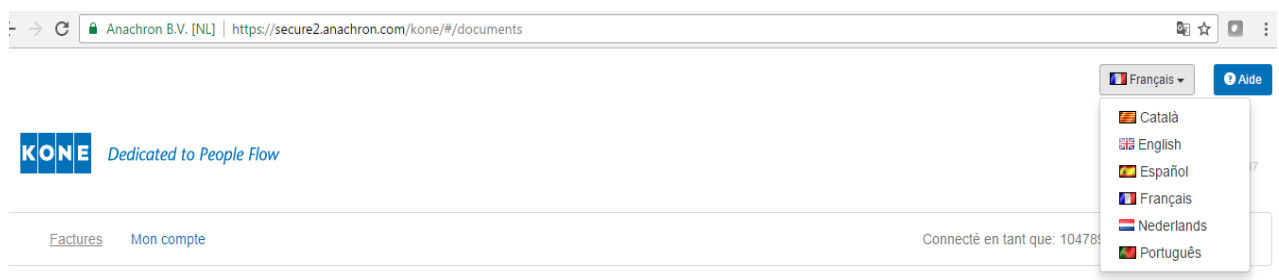
Password

The password entered is only valid if this consists of at least 8 characters, a combination of digits, letters and special characters. A client side help pop shows with green ticks if you meet the requirements. The initial password then has to be confirmed and of course has to correspond.

A message will be displayed when:

- The new password and confirming the new password are not identical.
- The new password consists of less than 8 characters.
- The new password does not consist of a combination of digits, letters and special characters.

Language



The portal login page language is based on the browser language setting. The portal language is based on the language set via the 'my account' settings. For the user roles: super admin, admin, employee and employee plus this is set when the account is created via the portal. For the user role customer this is initially based on the ISO country code in the input file, afterwards if desired the user can change his preference in the 'my account' tab. You can also change your language temporarily by not changing it in your account settings but simply by clicking on the language dropdown in the top right.

The language setting in the portal also defines the language setting in the emails. We support the following languages for the portal and mail templates:

- Dutch
- French
- English
- Spanish
- Portuguese
- Catalan

Invoices tab

English

Help

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Logged on as: support@anachron.com [Logout](#)

☐	Invoice no.	Type	Date proc'd.	Invoice date	No. Bill to	Name Bill to	No. Payer	Name Payer	Entity	Amount	Channel	Download
☐	 46885124	YMIO	21-04-2017	21-04-2017	10471248	HOTEL IBIS BUDGET	10471248	HOTEL IBIS BUDGET	France	€ 1,581.60	 	
☐	 46885123	YMIO	21-04-2017	21-04-2017	10471248	HOTEL IBIS BUDGET	10471248	HOTEL IBIS BUDGET	France	€ 1,581.60	 	
☐	 121104917	S1	21-04-2017	21-04-2017	10471248	HOTEL IBIS BUDGET	10471248	HOTEL IBIS BUDGET	France	€ 1,581.60	 	
☐	 46885121	YMIO	21-04-2017	20-04-2017	10427784	CARAC	10427784	CARAC	France	€ 491.40	 	

In this overview all (new) invoices are displayed (default: per 10 invoices). As soon as an invoice has been viewed by the customer, the related invoice 'view status' will change from 'new' to 'viewed' (this is indicated either by the 'unopened' or 'opened' envelope symbol).

If a user would like to view specific invoices, there are several search and filter fields available. The following search and filter fields are available:

- Invoice number (with our without leading zero's for SFA and 261 only)
- Document type
- Processing date from – to
- Invoice date from - to
- Bill to number
- Bill to name
- Payer number
- Payer name
- KONE Entity
- Read status
- Channel
- Delivery status
- Beyond delivery status

The search and filter criteria mentioned above can be used to search the information displayed in the columns. We show the following columns in corresponding order:

- Read status = read or unread depending on if the PDF or ZIP file has been downloaded
- Invoice number = with our without leading zero's for SFA and 261 only = iDoc field E1EDK01/BELNR
- Document type = iDoc field ZE1EDK1/FKART
- Processing date from – to = the last date the document is processed
- Invoice date from – to = the invoice date = iDoc field ZE1EDK1/FKDAT
- Bill to number = also the customer login ID = iDoc field E1EDKA1/PARVW[RE]/PARTN
- Bill to name = iDoc field E1EDKA1/PARVW[RE]/NAME1, 2, 3, 4
- Payer number = iDoc field E1EDKA1/PARVW[RG]/PARTN
- Payer name = iDoc field E1EDKA1/PARVW[RG]/NAME1, 2, 3, 4
- KONE Entity = iDoc field ZE1EDK1/VKORG
- Amount = iDoc field E1EDS01[SUMID="011"]/SUMME
- Channel = iDoc field EDI_DC40/MESCOD
- Delivery status = delivery status feedback from the channel
- Beyond delivery status = beyond delivery status feedback from the channel

The columns mentioned above are available for all user, except the customer user role. For the customer the view is restricted to the following:

- Invoice number = with our without leading zero's for SFA and 261 only = iDoc field E1EDK01/BELNR
- Processing date from – to = the last date the document is processed
- Invoice date from – to = the invoice date = iDoc field ZE1EDK1/FKDAT
- Payer number = iDoc field E1EDKA1/PARVW[RG]/PARTN
- Payer name = iDoc field E1EDKA1/PARVW[RG]/NAME1, 2, 3, 4
- KONE Entity = iDoc field ZE1EDK1/VKORG
- Amount = iDoc field E1EDS01[SUMID="011"]/SUMME
- Channel = iDoc field EDI_DC40/MESCOD
 - In the clickable pop up for PRI we show the address it is sent to and the batch it was processed in
 - In the clickable pop up for EMA we show the email address and timestamp it was sent to and the batch it was processed in
 - In the clickable pop up for POR we show the email address and timestamp it was sent to and the batch it was processed in
 - In the clickable pop up for ROAMING we show channel and address it was sent to plus the channel delivery feedback status
- Delivery status = delivery status feedback from the channel
- Beyond delivery status = beyond delivery status feedback from the channel
- PDF and CSV download options only

In this overview the following functionalities available:

- At the end of every invoice line ("Download column") the customer is able to directly download a ZIP file that contains all files for that invoice line (PDF, XML, CSV and possible separate attachments).
- At the bottom left it is indicated how many invoices are shown of the total selected invoices. Example: 1-10 of 30 invoices.
- At the bottom center the page number is indicated. By means of a 'listbox' the user can directly switch to the requested page if several pages containing invoices are present.
- At the bottom right the customer can select the number of invoices that is displayed per page. Default value is 10 invoices per page. The maximum number is a 100 per page view.
- Under the number of invoices per page a download is present "Download selection". Clicking this button will collect all formats of all selected invoices (by means of selected check boxes) into one zip file.
- All columns that are presented can be sorted except the "Download" column.

Once the download function has been used for a specific invoice the status of that invoice will change from 'new' to 'viewed'. All invoice lines in the invoices tab have a selection box. This selection box offers the possibility to select one or more invoices for the download (available at the bottom right).

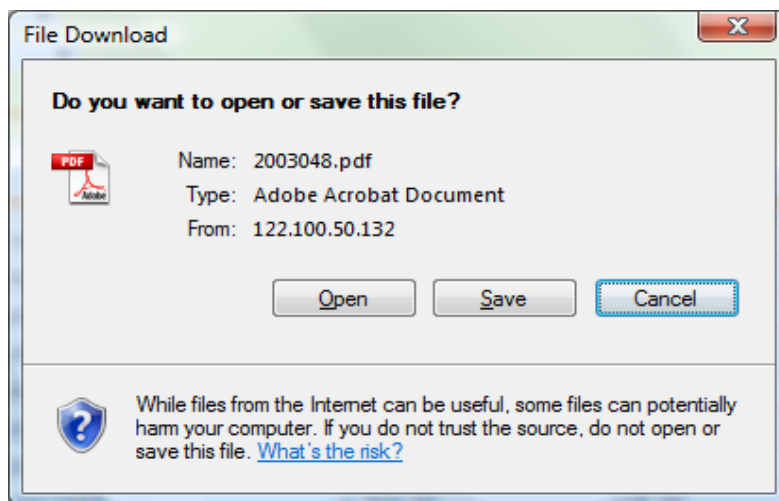
At the top of that column a selection box is available that can select/unselect all invoices in the invoice overview (on screen).

If by entering search and/or filter criteria then none, one or more invoices will be presented. The invoices will be presented with newest (invoice date) on top.

PDF invoice presentation

Opening a PDF invoice can be done by clicking on the invoice number at invoice line level.

Once the invoice number is clicked, depends on the setting of the browser, prompt with the notification as below appears.



By using the button "Open", the PDF version will open in Acrobat Reader.

By using the button "Save", the customer can save the PDF invoice to a customer desired location.

Invoice authenticity (PDF certificate)

In order to guarantee the authenticity of the PDF the digital signature is required. The information below will be included in the digital signature.

Order2Cash signs the PDF document, on behalf of KONE, as a supplier of the E-Invoicing Service. Based upon the KONE sending entity, the appropriate signature template for the related invoice needs to be triggered. This is related to the organization id that determines which template is to be used when signing the PDF. The template will contain the additional reason (KONE Invoice releasing entity) and location (KONE Invoice releasing entity) information that is added to the signature information.

Adobe Reader is able to verify the digital signature and a user can see if any changes have been made after the PDF is created as well as who is the sender.

The Anachron/Order2Cash Certificate is a certificate issued by QuoVadis. QuoVadis is listed on „Approved Trust List Member“ web page of the Adobe web site (<http://www.adobe.com/security/approved-trust-list.html>).

It could be that customers upon receiving and opening their first invoice receive a message in Adobe with respect to the applied signature. This can be caused that the certificate information (that was used to create and apply the signature on the PDF) was not present yet in the local Adobe customer application. The customer needs to add the certificate only once and the message will not appear again in future invoices.

Downloading invoices

There are two possible ways of downloading invoices from the E-Invoicing web application: by means of single invoice download and by means of multiple invoices download.

For the user roles: admin, employee and employee plus each downloaded PDF file is always marked with a watermark. For the user role customer the first time is without and the second and beyond try is with.

Single invoice download

A user can download an invoice number at an invoice line level by clicking on the PDF download icon. The user can also choose to download the metadata of the invoice, CSV file (YMI0 and SFA only) or ZIP file containing all files and attachment separate on an invoice line level. The metadata icon is only available for the user role admin.

Multi invoice download

The user can also choose to multi download the above mentioned documents by simply checking the checkboxes and click on the icons in the bottom right of the page. The icon in the bottom right corresponds with your selection and always download everything available. All selected invoices are collected now and archived in one ZIP file in the requested format. The filenames in the ZIP invoices file correspond to the chosen format. The resulting Zip can also contain zero, one or more attachments if present as part of the selected invoices.

Accounts tab

English 



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Logged on as: support@anachron.com [Logout](#)

[Search](#) [Reset](#)

[+ New](#)

Username	Name	Invoice mail	Channel	Role	Last Login	Status	Entity
10442976	STE IMMOB PARC CHANOT MICHELET	KOFINVOICSSFA@kone.com	Print	Customer		New	France
12684437	SYNDICAT CO PRO BENEVOLE MONSIEUR PATRICK COHENDET	KOFINVOICSSFA@kone.com	Print	Customer		New	France
12938803	SDC 61-69 RUE DE BERCY C/O TELMMA	KOFINVOICSSFA@kone.com	Print	Customer		New	France
10447846	A TOUT KRO	KOFINVOICSSFA@kone.com	Print	Customer		New	France
10439430	DURAND MONTOUCHE SARL	KOFINVOICSSFA@kone.com	Print	Customer		New	France

The following search fields are defined:

- Username = bill to number or corporate email address
- Name = bill to name or name defined when the account is created via the portal
- Channel = the channel the customer receives his invoices on
- Status = status of the account
- Entity = entity the account falls within, can be multiple but you always search on one

The following columns are displayed:

- Username = bill to number or corporate email address
- Name = bill to name or name defined when the account is created via the portal
- Invoice email = the email address the customer receives his invoices on, this applies for customers only
- Channel = the channel the customer receives his invoices on, this is based on the last set profile
- Role (the role of the user, a unique user can only have one role)
- Last login
- Status (status of the account)
- Entity (entity the account falls within, can be multiple but you always search on one)

Account status

Each account could have the following statuses:

- New: account is created but not used. New is only a searchable account status and the default starting status when an account is created.
- Active: the account status after first time login.
- Blocked: Only an Admin can block a user from entering the portal. In theory you could request a password reset when you are not allowed to login (generic message), however you will not receive a password reset email. To give the user access again the account status has to be changed to active again.
- Locked: after several failed login attempts an account status becomes locked. Via a password reset you can login again or an Admin can change your account status to active again.

Update accounts

Update account



Contact information

Name	<input type="text" value="STE IMMOB PARC CHANOT MICHELET"/>
Channel	<input type="text" value="Print"/>
Language	<input type="text" value="Français"/>
Email Portal	<input type="text" value="kofinvoicessfa@kone.com"/>
Invoice mail	<input type="text" value="KOFINVOICESSFA@kone.com"/>

Login settings

Username	<input type="text" value="10442976"/>
Status	<input type="text"/>
Role	<input type="text" value="Customer"/>
Password	<input type="text"/>

By clicking on the username you can update an account. In the update account pop up you can do the following:

- Change the status of the account into: locked, blocked and active
- Set a password for a customer (does not apply for the other user roles)
- Change you language (does not apply for the customer user role, this is via his account screen only)
- Change your email address (the regex validation that applies is x@x.x)

Create accounts

New account



Contact information

Name	<input type="text"/>
Language	<input type="text" value="English"/>
Email Portal	<input type="text"/>

Login settings

Username	<input type="text"/>
Status	<input type="text" value="New"/>
Role	<input type="text" value="Administrator"/>
Entity	<div>Andorra Belgium France Luxembourg Mond...</div>

Cancel

Save

Besides updating account and viewing the accounts you can also create and delete accounts.

- By clicking on the blue 'New' button you will see the pop up shown above. Here you can create an account for the user roles: admin, employee plus and employee. Customers are only created based on the unique and new bill to number for SFA only via the batch process.
- You can set the following things in the new account pop up:
 - Name (email + portal)
 - Language (email + portal)
 - Email address user for portal communication (regex is x@x.x)
 - Username used as login ID. For customers this is the bill to number, for the other user roles this should be the corporate email address in lowercase characters.
 - Status if the account, you can leave this blank as a default
 - The user role
 - The entity or entities the user role has access to. Please note, the user role employee is restricted to one entity. You can only create accounts within your entity access rights. This means that for example a French administrator can only create accounts for the French entities.
- You can delete accounts by simply clicking on the delete icon. Customer accounts cannot be deleted via the portal.

My account tab Super Admin, admin, employee plus and employee

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Contact information

Name	<input type="text" value="anachron"/>
Language	<input type="text" value="Français"/>
Email Portal	<input type="text" value="support@anachron.com"/>

Login settings

Username	<input type="text" value="support@anachron.com"/>
Status	<input type="text" value="Active"/>
Password	<input type="text"/>
Password confirm	<input type="text"/>

Save

In the 'My account' tab you can change the account settings for your own account only. In the screen you can change the following:

- Set a new default language (portal + email)
- Change your email address (regex is x@x.x)
- Set your password, this is not a reset so it is allowed to be the same as your already existing one. The password does have to be confirmed and meet the password requirements.
- If the changes are made, you click the blue 'Save' button the update your profile.

My account tab customer

[Invoices](#) [My account](#)

Logged on as: 12902942 [Logout](#)

Contact information

Name

SCI HOTEL D ENTREPRISES C/O SARL 2 F

Change your delivery channel

Print

Language

Français

Email Portal

kofinvoicessfa@kone.com

Invoice mail

KOFINVOICESSFA@kone.com

Login settings

Username

12902942

Status

Active

Password

Password confirm

☐ [I agree with terms and conditions](#)

In the 'My account' tab you can change the account settings for your own account only. In the screen you can change the following:

- Change your delivery channel, this will overwrite the channel for this user via the input file. A user can freely switch between the delivery channels EMA, POR and PRI. If you choose for EMA or POR then a valid email address for your invoice email is required.
- Email portal, here you can change your email address for portal communication, such as a password reset
- Invoice email, here you can change or add your email as a delivery method via POR or EMA
- Set a new default language (portal + email)
- Set your password, this is not a reset so it is allowed to be the same as your already existing one. The password does have to be confirmed and meet the password requirements.
- Before customer account changes are active, the customer is required to accept the terms and conditions by checking the checkbox. The terms and conditions is a clickable PDF document that opens in a new window. This document can be managed via the info tab.
- If the changes are made and correct, you click the blue 'Save' button the update your profile.
- The last set and changed account settings are shown in the 'Accounts' tab and the history is shown in the 'History' tab.

Reports tab

English

Help



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Logged on as: support@anachron.com [Logout](#)

Date procd. (from)	Date procd. (to)	Invoice date (from)	Invoice date (to)	Channel(All)	Delivery state(All)
No. Payer	No. Bill to	Type(All)	Entity(All)		
Report Name					Create report Reset

Date	Report Name	Size		
2017-04-20 13:20	s1 invoice type test_2017-04-19_2017-04-20.xls	6.0 kB	Download	Delete
2017-04-20 11:44	april ym1o_2017-04-01_2017-04-30.xls	10.5 kB	Download	Delete
2017-04-13 13:07	test_2017-04-12_2017-04-13.xls	2.1 MB	Download	Delete

In the reports tab you can create an Excel report based on a date range and the same search and filter criteria as is on the invoices tab. The mandatory requirements are a date and a name. The report is in Excel format only. You can download your report by clicking on the 'Blue' download button. You can delete your report by clicking on the red 'Delete' button. The total number of reports allowed is restricted to a 100 and after period of three months all reports will automatically be deleted.

Historic/History tab

English

Help

KONE *Dedicated to People Flow*

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InvoicesAccountsMy accountReportsHistoricInfo

Logged on as: support@anachron.comLogout

Search

Reset

Username	Name	Date approval T&C	Download PDF history	Channel	Last Login
12902942	SCI HOTEL D ENTREPRISES C/O SARL 2 F			Print	
10439972	CABINET GESSIC MARTINE			Print	
10981281	CCI DU PAYS D AUGUE			Print	
12849618	RESIDENCE CHEVILLON			Print	
12568129	RATP DEV			Print	
10442844	ARSEAA			Print	
10907378	REGIE REMONTEES MECANQUES CHAMROUS			Print	
10451044	CAISSE CONGES PAYS DU BATIMENT ET TRAVAUX PUBLICS			Print	

In the historic tab you can see and keep track of the 'My account' changes made by customers only. This information is permanently but restricted to 10 per item. After that it will remove the oldest item. So we only display the latest 10.

In this tab we show the following:

- Username = bill to number of SFA customers only
- Name = bill to name
- Date approved T&C = the date and timestamp when this user agreed with the terms and conditions when he changed his account settings
- Download PDF history = keeps track of the invoice numbers and count of the invoices downloaded by the customer
- Channel = the last channel set for this customer. It also keeps track of the channel changes the customer made with date and timestamp.
- Last login = it shows the timestamp of the last login of the this customer

Info tab

English

Help

KONE

Dedicated to People Flow

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InvoicesAccountsMy accountReportsHistoricInfo

Logged on as: support@anachron.comLogout

Terms And Conditions: English

+ Select a file

Name	Size	Status	Actions
Progress			

In the info tab you can do the following:

- Select an option in the dropdown for which icon and language you want to attach the PDF file. You can choose between the 'Help' icon and 'Terms and conditions' for the supported languages.
- You can only upload PDF files with a restriction of 5 MB.
- If you want to replace the existing file, then you simple overwrite the old one by attaching a new one to the same place.