K2 AP portal user guide

K2 Corporate Mobility is a Great Place To Work® because it's personal















Overview of this user guide

Welcome to the AP Portal. The AP Portal has been designed to assist you in uploading K2 invoices, checking their status' and downloading remittance advice.

As a result of the growth K2 has experienced over the years, we have created a more efficient online system when it comes to processing your invoice. This development seeks to continue K2's innovation following the Kinetic plan, wherein both our Partner Network and Technology pillars are in focus.

The portal replaces existing discussions across emails with a central chat hub in the Workspace, making for a more streamlined communications channel.

The Web Portal is available on: k2workspace.com

Please contact your K2 Relocation Manager with any questions or in the event you require assistance

















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Registering for usage of the AP portal

Receiving the invite: You will receive an email with your username and temporary password

Logging in:

- Click on the link to setup your account and create
 - your own password
- One time pin: Enter the OTP sent to your registered
 - mobile number

Create your profile: Your profile section will have your personal information as below

- Name and Last Name
 - Job title
- You can online edit these fields. If you need to
 - edit your phone number or email address, please
 - contact 'Support@k2workspace.com'

Adding your banking information

• This screen shows you all the accounts you have linked to your profile, including which account is set as the 'Primary' or default account. • Bank account details can be added, edited and deleted here















Tabs

On the left hand side you will be the below tabs:

• Invoices – this is a library of your invoices uploaded on the portal • Credits - this is a library of your Credit notes uploaded on the portal • **Payments** – this is a library of your payments and remittance advice • Your details - Some of the fields are editable. If some of your details have changed (e.g. phone number) please email 'Support@k2workspace.com'

• Partner managers - Anyone within your organisation who has access to the portal













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Creating and uploading an invoice

- Click on 'Add New Invoice' and complete the fields
- Ensure that the currency entered matches
 - the currency of the actual invoice
- Select the correct Billing office if in doubt,
 - please check with the Relocation Manager
- Select your banking account
- Select the K2 Contact please refer to the
 - instructions sent when initiating your services
- Add the amount. Please note that the tax
 - is an amount, not a percentage
- Add the invoice date
- Add an invoice reference
- Upload your invoice
- You can edit the invoice once created by clicking on 'edit'















Checking the status of your invoice

On the left hand side, click on 'Invoices', you will see the status of your invoice. It will be one of the below:

- Pending: Awaiting for the Relocation Manager to
 - approve the invoice
- Client Serving Approved: Approved by the
 - Relocation manager
- Approved: Approved by Finance
 - Paid: Payment has been made by K2
 - Credited
 - Declined
- Click on the Invoice Reference You will see the due date of the invoice once the Relocation Manager has approved the invoice
- Once paid, you will be notified when the remittance
 - advice is available. You can also click on the payment
 - reference and download the remittance











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Creating and uploading a new credit note

- You will be able to upload you Credit Notes directly onto the Portal. On 'Credits', simply click on 'Add New Credits' and manually add it.
- Our Finance team will be able to reconcile your the Credit Note against your original invoice.

















Help

• Need help? For any issues, click on Need Help and navigate according to your issue

















Purchase order

- Adding Purchase Orders against your
 - invoice (if available)
- Please add/remove Purchase Orders
 - based on descriptions















Frequently asked questions

- A selection of common queries and
 - responses can be found on the FAQs page
- Short videos are also located here to help
 - navigate the platform













Visit us online at k2corporatemobility.com

