User Guide

Basware Network (November 2019)

About Basware Network Support Documentation

The following documentation is available for Basware Network users:

- Online Help
- This User Guide

Disclaimer

Trademarks

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1 Getting Started

Basware Network is an online tool. This means that you only need a modern web browser to use the service.

1.1 Open the application

1. Open your web browser.
2. Browse to the **Login** page:

   https://portal.basware.com
3. Enter your username and password in the **Username** and **Password** fields.

   If you have forgotten your password, you can reset your password on the login page.
4. Click **Log in** to log in to the service.

You will be automatically logged out of the service after five minutes of inactivity.

1.2 Close the application

In the top-right corner of the page, click **[Your Username]** > **Log Out**.

You will be automatically logged out of the service after five minutes of inactivity.

2 Basware Network home page

On the Basware Network home page, you can view a short introduction about the funcionalities and benefits of Basware Network. You can also view your current tasks and transactions on the **Dashboard**. You can also contact Basware support and navigate to the documents that you have in *draft* status through this page.

Dashboard

On the left panel in **My Tasks** view, you can view notifications from your business partners and from Basware Network. By expanding the other views, you can see statistical information about the invoices you have received and sent, purchase orders you have sent, and campaigns you have managed. You can navigate directly to the relevant business document by clicking the links in the views.

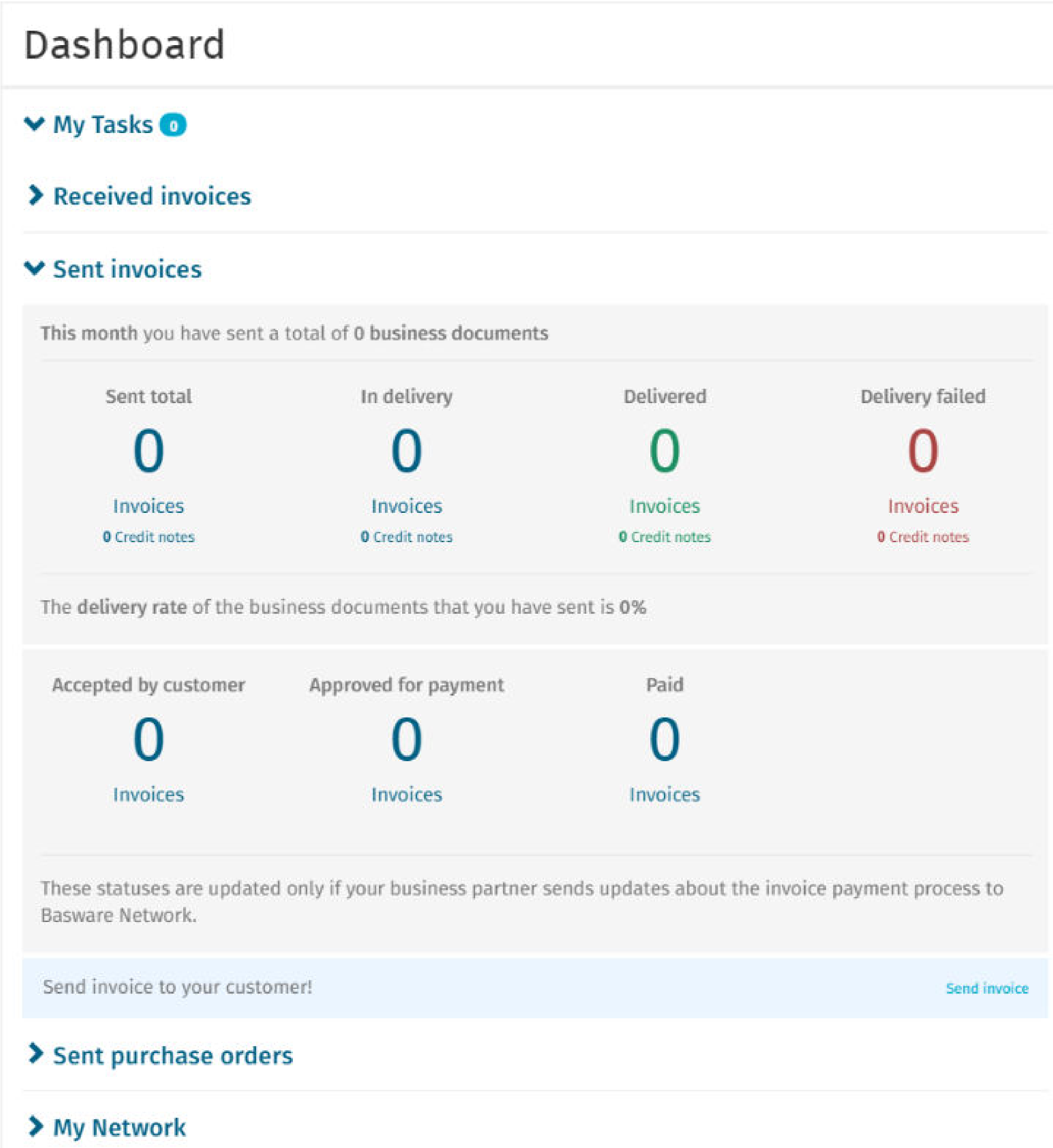


Figure 1: Dashboard views

3 Your User Account and Settings

Your personal information is displayed on the **My Account** page. There, you can:

- View and edit your user information
- Change your password
- Upload a profile picture

Users and user roles

Each organization in Basware Network has two types of user roles, *regular users* and *company administrators*. Regular users can, for example:

- create and view business documents
- view the details of their company and it's subsidiaries

In addition to performing these tasks, company administrators can, for example, create new user accounts and edit their company's details. For details, see User roles and rights.

3.1 View and edit your account information

You can view and edit your user account information and change your password on the **My Account** page.

1. On the top-right corner, click **[Your Username]** > **My Account**.

   The **My Account** page opens.
2. Click **Edit** to edit your user information.

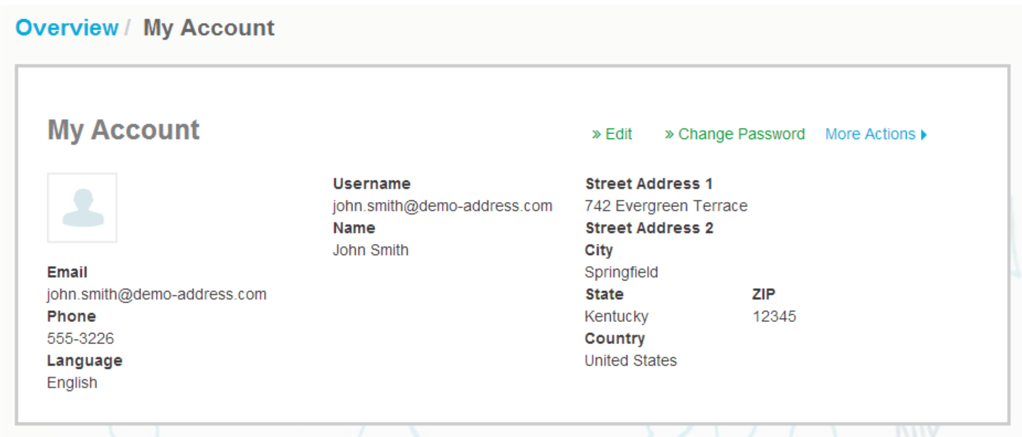


Figure 2: My Account view

3. Make the necessary changes to your user information.

Your **Username** is your user account's unique identifier in the service. Therefore, you cannot change or edit your **Username**.

If an employee who uses Basware Portal leaves your company and you want to change the name of that employee's user account, you must instead Add a user to your organization.

For descriptions of the fields on this page, see My Account.

4. Click **Save Changes** to save any changes you have made, or click **Cancel** to discard them.

3.2 Change your password

You can change your password on the **My Account** page.

If you have forgotten your password, you can reset your password on the login page.

1. On the top-right corner, click **[Your Username]** > **My Account**.

   The **My Account** page opens.
2. Click **Change Password**.
3. Enter your current password in the **Current password** field.
4. Enter your new password in the **New password** field.

   Click **Show** to show the characters of the password. Your password must contain:
   - 10 characters
   - a lowercase character
   - an uppercase character
   - a special character
   - a number
5. Click **Change Password** to save your new password.

You will be prompted to change your password every 45 days. If your password has expired, you will be automatically directed to the **Change Password** page when you log in. You cannot reuse the three previous passwords you have used in Basware Network.

3.3 Reset your password

If you have forgotten your password, you can reset your password on the login page.

1. Open the **Login** page:

   https://portal.basware.com

2. Click **Forgot your password?**.
3. Enter your **Username** in the **Username** field.

   In most cases, your **Username** is the email address you used when you registered to the service.

4. Click **Send Request**.

   The service sends you an email with a link to the page, where you can reset your password.
5. When you receive the email, click the link to open it in your default web browser.

   The **Reset Password** page opens.
6. Enter your new password in the **New password** field.

   Click **Show** to show the characters of the password. Your password must contain:
   - 10 characters
   - a lowercase character
   - an uppercase character
   - a special character
   - a number
7. Click **Change Password** to save your new password.

3.4 Upload a profile picture

You can upload a profile picture to Basware Network on the **My Account** page.

1. On the top-right corner, click **[Your Username]** > **My Account**.

   The **My Account** page opens.
2. Click **Edit**.
3. Click **Upload** and select a profile picture.

   You can upload pictures in JPEG, GIF or PNG format only.

   Once the picture has been successfully uploaded, it will be displayed on **My Account** page.
4. Click **Save Changes** to save the new profile picture.

4 Manage Your Company

Your company's information is stored on the **My Organization** page. There, you can:

- View and edit your company's information
- Find organizations
- Find users
- Add new users to your organization
- Manage your company's bank accounts
- Upload your company's logo

4.1 View and edit your company's information

You can view your company's information on the **My Organization** page. Users with *Company Administrator* user rights can also make changes to their company's information.

The information written on your company profile can be viewed by anyone with access to the Business Directory in Basware Network.

1. On the top-right corner, click **[Your Username]** > **My Organization**.
2. Click on the name of the organization that you want to view or edit.

   If your company is made up of a single organization, you will be taken directly to the **My Organization** page without you having to click on the name of an organization.

   If your company is made up of multiple organizations, each child organization will be displayed on this page in alphabetical order.

3. Click **Edit**.

   The edit view opens.
4. Make the necessary changes to your company's information.

   If your organization is located in the European Union, you must fill in a valid **Organization's Identifier**. Without a valid identifier, organizations in the EU can not send invoices.

   For detailed descriptions of the fields, see My Organization.
5. Click **Save Changes** to save the changes you made, or click **Cancel** to discard them.

4.2 Find an organization

If your company is made up of multiple organizations, you can use the search on the list of organizations to find a specific organization.

1. On the top-right corner, click **[Your Username]** > **My Organization**.
2. Enter the name, or a part of the name, of an organization in the **Search** field.
3. Click **Search**.
4. To filter the search results by organization details, add the filters you want to use:
   a) Click to open the **Advanced Search** view.
   b) Enter the filters that you want to use:
      - **Electronic Invoicing Address**: Show organization(s) with a specific eInvoicing address.
      - **City**: Show organization(s) from a specific city.
      - **Organization's Identifier**: Show organization(s) with a specific identifier.
      - **Country**: Show organization(s) from a specific country.
      - **Capabilities**: Show organization(s) that use certain types of services
      - **Service Subscription Type**: Show organizations(s) that have a certain type of service subscription.
5. Click **Search**.

   The results that match your query are displayed in the **Search Results** table.
6. To sort the list of results based on the organization name, click on **Organization Name** label.

   The arrow icon next to the label shows you whether the results are sorted in an ascending or a descending order. To reverse the order, click on the label again.

4.3 Find a user

You can find users from your company and any subsidiary organizations through the **My Organization** page.

1. On the top-right corner, click **[Your Username]** > **My Organization**.
2. Click on the name of the organization, whose users you want to view.

If your company is made up of a single organization, you will be taken directly to the **My Organization** page without you having to click on the name of an organization.

If your company is made up of multiple organizations, each child organization will be displayed on this page in alphabetical order.

3. Click **More Actions**.
4. From the drop-down list, select **View Users**.

   The **Users** view opens and displays a list of users in your company and all its subsidiary organizations.
5. To filter the results, enter the user's name, or a part of their name, in the **Search** field.
6. Click **Search**.

   The users that match your query are displayed in the **Search Results** table.
7. To view the user's information, click on their username in the **Search Results** table.

4.4 Add a user to your organization

Company administrator users can add users to your organization through the **My Organization** page. The users that are added can access only the information and the business documents of the organization that they were added to, and all subsidiaries of that organization.

1. On the top-right corner, click **[Your Username]** > **My Organization**.
2. Click on the name of the organization, to which you want to add a new user.

   If your company is made up of a single organization, you will be taken directly to the **My Organization** page without you having to click on the name of an organization.

   If your company is made up of multiple organizations, each child organization will be displayed on this page in alphabetical order.
3. Click **More Actions** > **Add User**.

   The **Create New Account** view opens.
4. Enter the new user's details.

   Once you have selected and saved the **Username**, it is not possible to change it later.

   Use the **Role** radio button set the user role:

   - **End user**: end users can see and work with the business documents that your company has received.
   - **Company administrator**: in addition to working with business documents, company administrators can add new users and organizations under your company.

   Basware Network validates the contents of the fields and notifies you if the content of a field does not pass validation.

5. Click **Save Changes** to create a new user, or **Cancel** to cancel the operation.

After you click **Save Changes**, Basware Network sends an email to the new user. The email contains an activation link that the user can use to activate their account and set a password. They can start using the service once they've activated their account and set a strong password.

4.5 Manage your company's bank accounts

Users with *Company Administrator* user rights can:

- add new bank accounts
- edit existing bank accounts
- remove bank accounts
- mark a bank account as a favorite

on the **My Organization** page.

Add a bank account

1. On the top-right corner, click **[Your Username]** > **My Organization**.

   The **My Organization** page opens.
2. Click **Edit**.

   The edit view opens.
3. Under **Banking Details**, click **Add Bank Account**.

   Basware Portal creates blank **Account Number**, **SWIFT/BIC**, **IBAN**, and **Name** fields for the new bank account.
4. Enter the details of the new bank account in the blank fields.

   You must fill in at least one of the following fields:
   - **Account Number**
   - **SWIFT/BIC**
   - **IBAN**
5. Click **Save Changes** to save the new bank account, or click **Cancel** to cancel the operation.

Edit a bank account

1. On the top-right corner, click **[Your Username]** > **My Organization**.

   The **My Organization** page opens.
2. Click **Edit**.

The edit view opens.

3. Click the bank account field(s) that you want to change, and edit the contents of the field.
4. Click **Save Changes** to save the changes you made, or click **Cancel** to discard them.

Remove a bank account

1. On the top-right corner, click **[Your Username]** > **My Organization**.

   The **My Organization** page opens.
2. Click **Edit**.

   The edit view opens.
3. Click ⛔ above the bank account that you want to remove.

   The **Remove Bank Account** confirmation window opens.
4. Click **Yes** to delete the bank account.
5. Click **Save Changes** to save the changes, or click **Cancel** to cancel the operation.

Set a bank account as your favorite

If you have multiple bank accounts, you can set one of the bank accounts as your favorite. When you create a new document, your favorite bank account will be added to it by default.

1. On the top-right corner, click **[Your Username]** > **My Organization**.

   The **My Organization** page opens.
2. Click **Edit**.

   The edit view opens.
3. Click ☆ above the bank account that you want to set as your favorite.

   The favorite icon (★ is shown above the bank account.
4. Click **Save Changes** to save the changes, or click **Cancel** to cancel the operation.

4.6 Upload your company’s logo

Users with *Company Administrator* user rights can upload their company's logo to Basware Network on the **My Organization** page. The logo will be shown, for example, on all business documents that your company sends through Basware Network.

1. On the top-right corner, click **[Your Username]** > **My Organization**.

   The **My Organization** page opens.
2. Click **Edit**.

The **Edit Organization** view opens.

3. Click **Upload** and select the image file.

   You can upload pictures in JPEG, GIF or PNG format only.

   Once the image has been successfully uploaded, it will be displayed under **Organization’s Logo** label.

4. Click **Save Changes** to save the new logo, or **Cancel** to cancel the operation.

5 Working with Invoices, Credit Notes and Other Business Documents

Business documents are documents that your company uses to interact with other companies. Common business documents include, for example, **invoices**, **purchase orders** and **credit notes**. With Basware Network, you can:

- Find a document
- Find a document using advanced search
- Create an invoice
- Convert an invoice into a credit note

Basware Network manages your business documents through their entire life-cycle. You can use Basware Network to track the status of each of your documents.

Basware Network stores all your business documents online for a set period of time. Consult your Service Description documentation to find out for how long your business documents are available through the service.

5.1 Getting an overview of your business documents

The **Documents** page gives you an overview of all your business documents - **invoices**, **purchase orders**, and **credit notes** - and their statuses. You can manage your organization's business documents on the **Documents** page. You can use the search form on top of the page to find documents, and the page is divided into several tabs to help you browse your documents with ease.

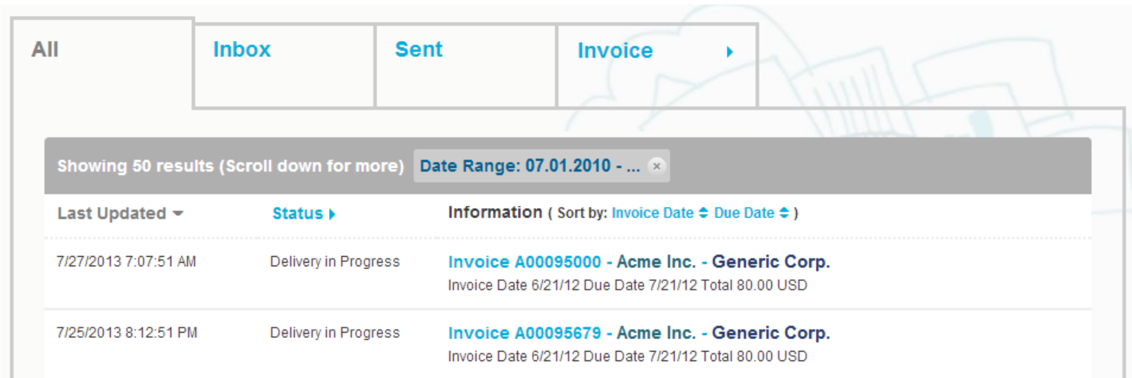


Figure 3: Documents page

All tab	shows all the business documents that your organization has either sent or received.
Inbox tab	shows all the business documents that your organization has received.

Sent tab shows all the business documents that you have sent to your business partners. The tab also shows the draft versions of all the business documents that you are working on.

Business Document tab the rightmost tab on the page shows all business documents of a certain type that your organization has sent and received. Click the label of the tab to select which types of documents are shown on this tab.

5.2 Business document statuses

You can follow up on your business documents' statuses in Basware Network. The following list explains what the different statuses mean and what you can do if one of your business documents has been rejected or cannot be delivered.

Table 1: Statuses and their explanations

Status	Description
Draft	Business documents that you haven't yet sent appear in **Draft** status
Ready for Delivery	Business documents that you have sent, but that have not yet been forwarded to delivery, appear in **Ready for Delivery** status.
Delivery in Progress	Business documents that are currently being delivered to the recipient appear in **Delivery in Progress** status
Delivered to Recipient	Business documents that have been delivered to the intended recipient appear in **Delivered to Recipient** status
Received	Business documents that the recipient has opened appear in **Received** status
Rejected during Delivery	Business documents that have been rejected during the delivery process appear in **Rejected in Delivery** status Usually, this means that Basware Network has forwarded your document to your business partners e-invoicing operator, but their system has rejected the document. If your document gets rejected, make sure that contents of the document are valid, and try sending the document again. If the problem persists, contact Basware Support.

Status	Description
Error in Delivery	Business documents that Basware Network could not deliver to the intended recipient appear in **Error in Delivery** status Often, this message is caused by a temporary delivery failure. If, however, your document remains in this status for over 24 hours, contact Basware Support.

5.3 Find and view business documents

Business documents are documents that your company uses to interact with other companies. Common business documents include, for example, **invoices**, **purchase orders** and **credit notes**. With Basware Network, you can:

- Find a document
- Find a document using advanced search

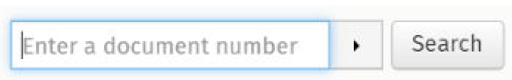
5.3.1 Find a document

When you log in to Basware Network, you'll see a list of all the business documents that your company has received, and that you have sent to your business partners. If you are looking for a specific document, you can use search to limit the number of search results.

When you log into Basware Network, you'll see a list of business documents that you've sent and received in the last 30 days. To see all your business documents, close the **Date Range** pane at the top of the **Search Results** table.

1. Open the Documents page in Basware Network

   The URL of the page is `https://portal.basware.com/documents`.
2. Enter the business document number in the **Search** field.

3. Click **Search**.

   The business documents that match your query are displayed in the **Search Results** table.

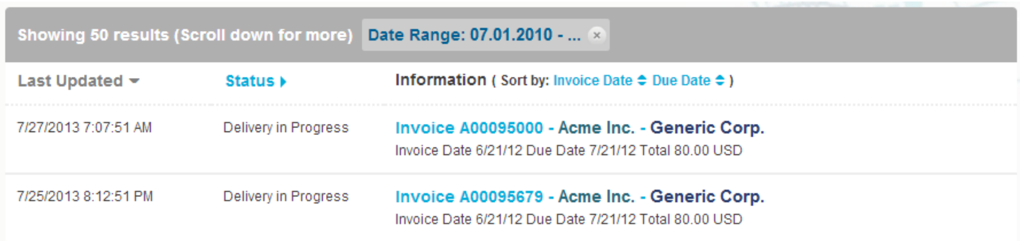


Figure 4: Search Results table

For information on how to refine your search, see Find a document using advanced search.

4. To sort the results, click on the **Sort** labels:

Figure 5: Sort by labels

5. To view a business document, click the title of the business document in the **Search Results** table and the Business document page opens.

The service notifies you, typically within 7 to 14 days, if you have forgotten to open an invoice that you've received from your business partner.

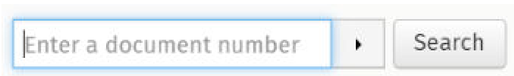
5.3.2 Find a document using advanced search

When you log into Basware Network, you'll see a list of business documents that you've sent and received in the last 30 days. To see all your business documents, close the **Date Range** pane at the top of the **Search Results** table.

1. Open the Documents page in Basware Network

   The URL of the page is `https://portal.basware.com`.

2. Enter a document number in the **Search** field.



3. To filter search results by document details, add the filters you want to use:

   a) Click ▸ to open the **Advanced Search** panel.

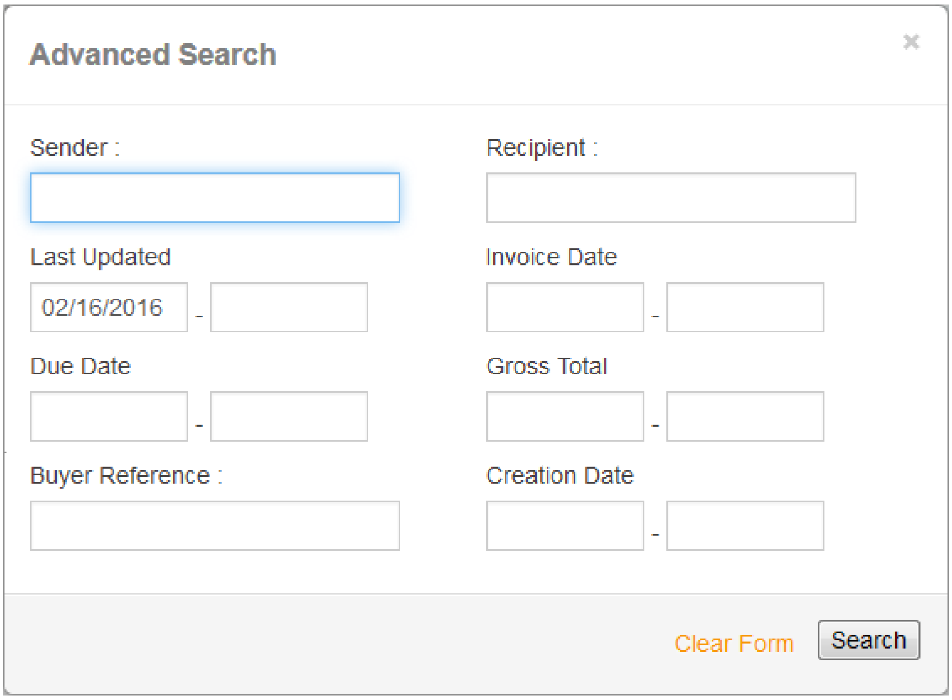


Figure 6: Advanced Search panel

b) Enter the filters that you want to use:

- **Sender**: Show documents from a specific sender.
- **Recipient**: Show documents sent to a specific recipient.
- **Last Updated**: Show documents that have been updated within the defined period.
- **Invoice Date**: Show documents, whose invoice date is within the defined period.
- **Due Date**: Show documents, whose due date is within the defined period.
- **Gross Total**: Show documents, whose gross total amount is within the defined limits.
- **Buyer Reference**: Show documents with a specific buyer reference number.
- **Creation Date**: Show documents with a specific creation date.

4. Click **Search**.

The documents that match your query are displayed in the **Search Results** table.

5. To sort the results, click on the **Sort** labels:

Figure 7: Sort by labels

- **Invoice Date**: Sort the results based on invoice dates of the documents.
- **Due Date**: Sort the results based on due dates of the documents.

The arrow icon next to the label defines whether the results are sorted in an ascending or a descending order. To reverse the order, click on the label again.

6. To view a document, click the title of the document in the **Search Results** table, and the Business document page opens.

> The service notifies you, typically within 7 to 14 days, if you have forgotten to open an invoice that you've received from your business partner.

5.3.3 Business document page

The **Business Document** page shows you a detailed description of a business document.

Header section

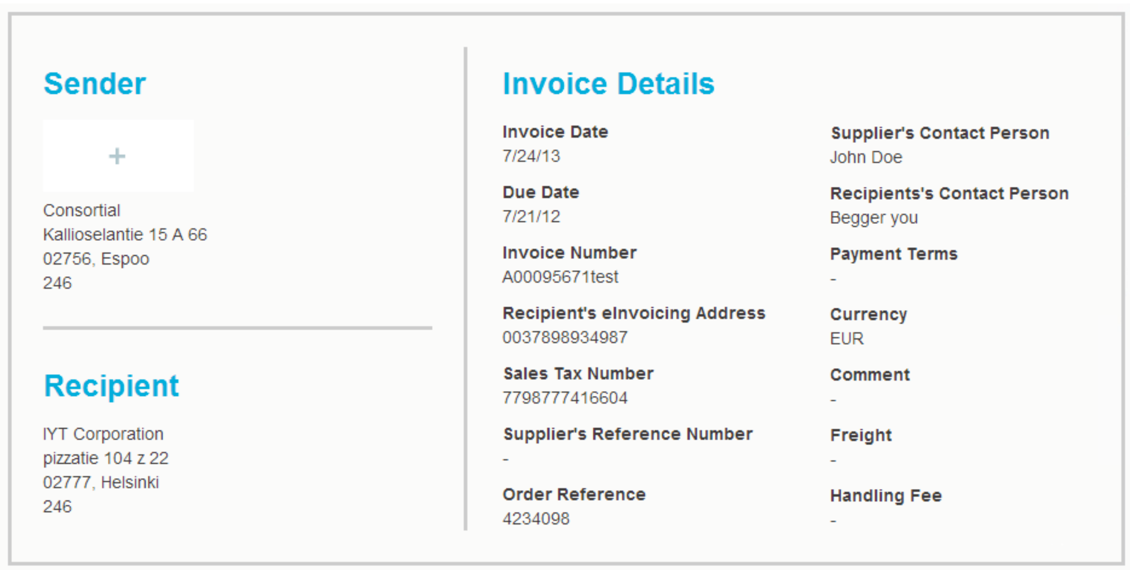


Figure 8: Header section

The Header section contains the basic details of a business document and information about the Sender and the Recipient of the document. This section contains, for example, the following information:

- **Sender**: Contact information of the organization, who have sent the business document
- **Recipient**: Contact information of the organization, who are the recipients of the business document

- **Business Document Details**: For example, the business document number, creation and due dates of the business document and contact persons of the document's sender and the recipient.

Additional Information section

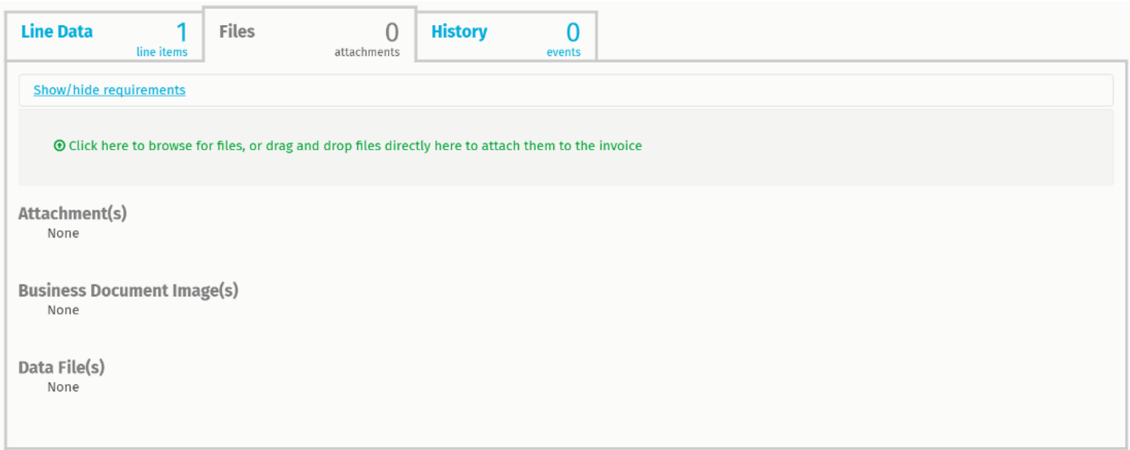


Figure 9: Additional Information section

The Additional Information section shows you a detailed description of the business document content and shows you the history of the business document. The section is divided into three tabs:

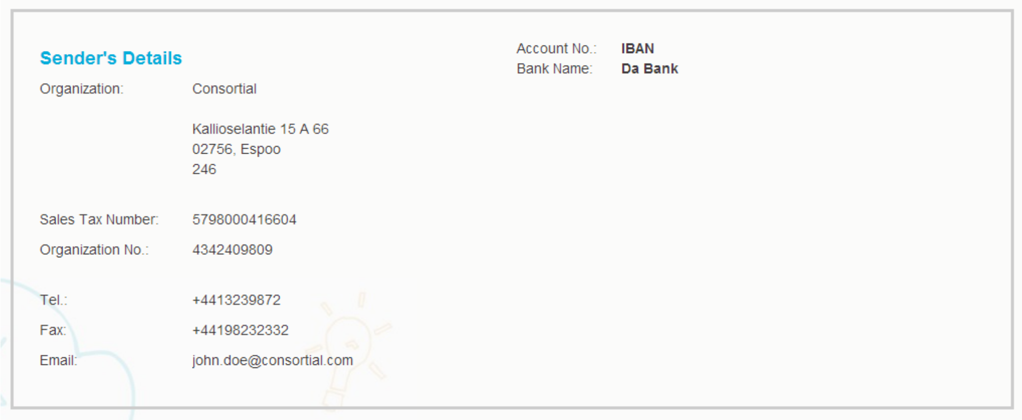
- **Line Data** tab lists the individual invoice lines on the business document, and a summary of the business document.
- **Files** tab contains all the files - attachments, business document images, and data files - that are attached to the business document.
- **History** tab contains all the dates related to this business document. On this tab, you can check when the business document was first sent, when it was accepted by the recipient, and when it was paid.

Tax Details section

Figure 10: Tax Details section

The Tax Details section shows you an overview of the various taxes related to this business document.

Sender's Details section



The Sender's Details sections shows you the contact information and banking details of the company that sent the business document.

5.3.4 Download attachments

You can download attachments from the **Files** tab on any business document page.

1. Click **Documents**.
2. Navigate to the business document you want to download attachments from and click the title of the business document.

   You can open the business document page from the **All**, **Inbox**, **Sent** or **Invoice** tab.
3. On the business document page, open the **Files** tab.
4. Click an attachment to download it.
   The attachment is downloaded onto your device.

5.3.5 Business document types

Table 2: Business document types

Business document	Description	Note
Invoice	A business document under which a supplier charges a buyer for transaction(s) and which contains an itemized list of goods and services bought.	Typically contains at least the following elements: • unique reference number • date of issuing the invoice • relevant tax payments, such as GST and VAT • name, details and contact address of the supplier • name, details and contact address of the buyer • date on which the good or service was sold or delivered • unit price of the good or service
Credit note	An invoice that indicates a credit amount owed by the supplier.	

Business document	Description	Note
Purchase order	A business document which specifies needed goods or services and represents an agreement between buyer and seller.	Typically contains the following header data elements: • purchase order number • order date • recipient • delivery and invoicing addresses Basware consultants can set up business rules for invoices that have been created from purchase orders that increase the accuracy of matching your invoices, and prevent suppliers from over-invoicing your organization.
Order change/cancellation	A purchase order message from a buyer, which is used to modify or cancel an existing purchase order.	

5.4 Create an invoice

1. On the **Documents** page, click **Create New** > **Invoice**.

   Basware Network opens the **Edit Invoice** view and creates a draft invoice.

2. Select a sender.

   By default, the service selects your favorite organization as a sender. You can change the sender manually, if necessary.

   a) To change the sender, click **Change** under **Sender**.

   b) Find the company you want to select as the sender and click **Select**.

Click the ☆ icon next to the name of a company to set that company as your favorite. Your favorite companies will always be displayed at the top of the list.

3. Select a recipient.
   a) Click **Select Recipient**.
   b) Find the company you want to select as the recipient and click **Select**.

   Use the search field to filter out companies from the list.

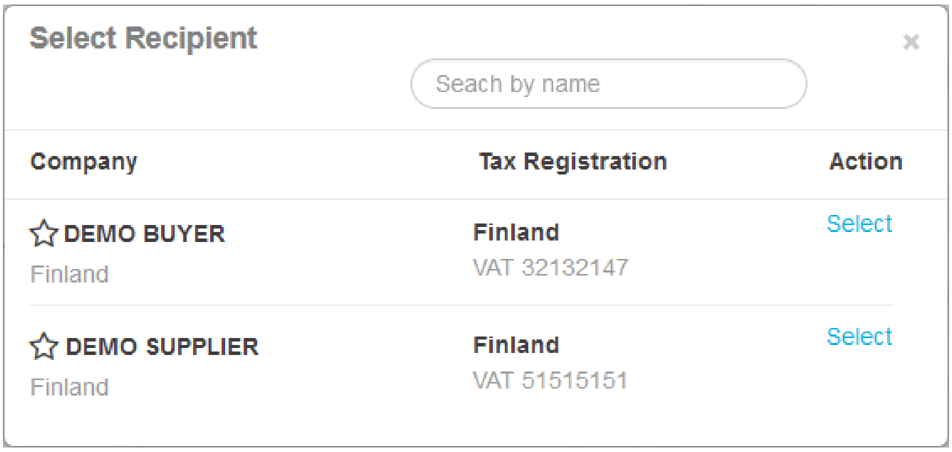


Figure 11: Select Recipient window

If the recipient you selected has a tax registration number in multiple countries, a list of available tax registration countries will open. Select the tax registration country you want to use with this invoice.

Click the ☆ icon next to the name of a company to set that company as your favorite. Your favorite companies will always be displayed at the top of the list.

4. Enter the invoice details.

   The service validates the contents of the fields and notifies you if the content of a field does not pass validation. For descriptions of the fields, see Invoices.

5. Enter the line data.
   a) On the **Line Data** tab, click **Add Line** to add a new invoice line.

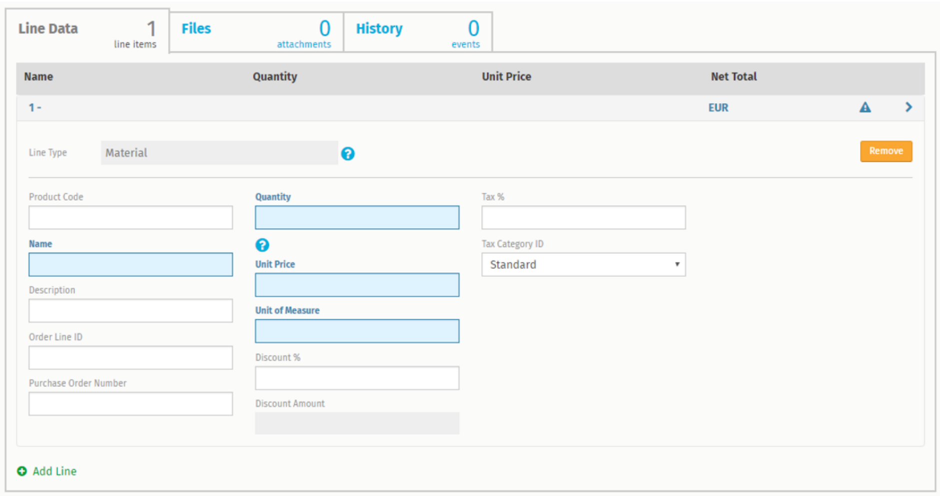


Figure 12: Invoice lines

b) Enter the details of the line item.

You can only select line types that the recipient supports. For descriptions of the fields and more information about line types, see Field Names and Descriptions

The decimal separators used on the line items differ based on the user interface language that you have selected. Should you use an incorrect decimal separator may cause Basware Network to save the number you enter incorrectly. To find out which decimal separators each language supports, see Table 27: Language-based decimal separators

Different buyers may require a different number of fields on their invoices. The fields you see on the invoice may be different than in the figure above.

Similarly, some buyers may enforce various validation rules on certain invoices fields. They may, for example, limit you from setting the invoice date too many days in the past, or place limitations on how many characters you may enter in certain fields.

c) Click **Add Line** to add another line item, if necessary.

6. Add invoice attachments.

a) Click **Files** to open the **Files** tab.

b) Click the highlighted text to browse for attachments, or drag and drop files directly on the highlighted text to attach them to the document.

If the sender organization's profile has no bank account, you can add a bank account in the **Sender's Details** section. Bank accounts that are added to directly to an invoice will not be saved to the organization's profile.

7. Click **Send Invoice** to send the invoice to your customer.

Basware Network does not store the invoice data indefinitely. Remember to download a copy of the document image through the Files tab and store it locally.

5.5 Convert an invoice into a credit note

You can convert an invoice you have created into a credit note. This way you do not have to fill in all the fields of the credit note yourself, but the service fills in a number of the fields based on the original invoice.

1. Locate the invoice that you want to convert into a credit note on the **Documents** page.
2. Click the invoice to open the invoice page.
3. Click **Convert To Credit Note**.

   The service creates a credit note based on the invoice details.
4. Fill in the credit note details.

   Mandatory fields are marked with a blue background.

   Make sure that the **Invoice Reference** field contains the number of the invoice this credit note refers to.
5. Edit the **Line Data** information so that the lines contain the products/services that you want to reimburse.
6. Add attachments to the credit note.

   If you need to add attachments to the credit note, you can add them through the **Files** tab.

   a) Click **Files** to open the **Files** tab.
   b) Click the highlighted text to browse for attachments, or drag and drop files directly on the highlighted text to attach them to the document.
7. Click **Send Credit Note** to send the credit note to your customer.

   You can also click **Save Draft** to save the credit note draft for later use.

Basware Network does not store the invoice data indefinitely. Remember to download a copy of the document image through the Files tab and store it locally.

5.6 Accept a purchase order

The section describes an optional Basware service. You'll need the Invoice Key-In and PO Flip service to follow these instructions.

When you receive a purchase order from your customer, you must accept it before you can invoice the ordered items.

1. On the **Documents** page, click on a purchase order to open it.
2. Review the purchase order.
   - If the contents of the purchase order are correct, proceed to the next step.
   - If the contents of the purchase order are not correct, you can reject the purchase order
   - If the contents of the purchase order are not correct and you want to make small changes, you can propose a change to the purchase order.
3. Click **Accept** to accept the purchase order.

   The **Accept Purchase Order** popup opens
4. If you want to add comments to the recipient, enter them in the **Comments to buyer** field.
5. Click **Confirm** to accept the purchase order.

   The purchase order is now in *Accepted* status, and you can convert it into an invoice.

5.7 Convert a purchase order into an invoice

The section describes an optional Basware service. You'll need the Invoice Key-In and PO Flip service to follow these instructions.

You can convert purchase orders that are in *Accepted* status into invoices.

1. On the **Documents** page, click on a purchase order that you have accepted to open it.
2. Click **Convert to Invoice** to convert the purchase order into an invoice.

   Basware Portal converts the purchase order into a draft invoice. All data from the purchase order is copied onto the draft invoice.

   For instructions on how to edit and send the invoice, see Create an invoice and follow the instructions from step 3 onwards.

5.8 Propose a change to a purchase order

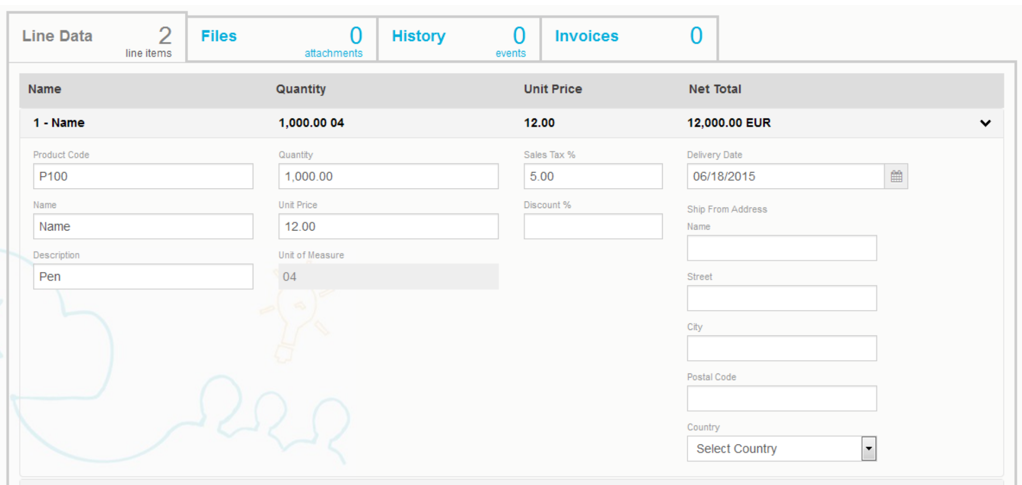
The section describes an optional Basware service. You'll need the Invoice Key-In and PO Flip service to follow these instructions.

If you receive a purchase order that you cannot, for example, fulfil completely, you can propose a change to the purchase order.

1. On the **Documents** page, click on a purchase order to open it.
2. Review the purchase order.
3. Click **Propose Change** to reject the purchase order.

   The **New Purchase Order Response** page opens
4. Set the **Promised Delivery Date**.
   - To define a common **Promised Delivery Date** for all line items, select the **Specify delivery information at header level** radio button, and choose a date under **Promised Delivery Date**.
   - To define a **Promised Delivery Date** for each line item separately, select the **Specify delivery information at line level** radio button.
5. Click the line item to which you want to propose a change.

   A detailed view of the line item opens.



   You can propose changes to as many line items as necessary.
6. Update the line item details to which you want to propose a change.
7. Click **Send Response** to send your proposed changes to the buyer.

5.9 Reject a purchase order

The section describes an optional Basware service. You'll need the Invoice Key-In and PO Flip service to follow these instructions.

If you receive a purchase order that you cannot fulfil, you can reject the purchase order.

1. On the **Documents** page, click on a purchase order to open it.
2. Review the purchase order.
3. Click **Reject** to reject the purchase order.

   The **Reject Purchase Order** popup opens
4. In the **Comments to buyer** field, add a comment to the buyer that describes why you have rejected the purchase order.
5. Click **Confirm** to reject the purchase order.

   The purchase order is now set to *Rejected* status. Basware Network notifies the buyer that you have rejected their purchase order.

6 Managing the settings of your services

You can manage your services and activate new services on the **Services** page. You can configure the settings of services in the **View Details** page of each service.

6.1 Configure notifications

You can turn notifications about new messages on and off from a service's **View Details** page.

- If you have activated the **Online Receiving** service, you receive notifications about new invoices, and your notifications function as reminders about unopened invoices.
- If you have activated the **Email Receiving** service, your notifications contain the PDF image of each new invoice as an attachment. The invoice image is delivered to all users who have been configured as recipients of notifications.

1. Click **Services**.
2. Select a service.
3. Click **View Details**.
4. Click **Notifications** to open the email notification settings.
5. Set your notification preferences:
   - To receive notifications about new messages, check the **Activate** checkbox, and enter the email address to which you want to receive notifications in the **Email** field. Click **Save** to save the changes.
   - To disable notifications, uncheck the **Activate** checkbox. Click **Save** to save the changes.

6.2 Add a new recipient

You can add new recipients to the invoice emails that are sent by notification services on the **View Details** page of a service.

1. Click **Services**.
2. In the **Receiving Invoices** section, select either **Email Receiving** or **Online Receiving** depending on which service your company has activated.

   If your company has activated either **Email Receiving** or **Online Receiving**, the other service of the two will be disabled.
3. Click **View Details**.

4. Click **Notifications** to open the email notification settings.
5. Add an existing user to the recipient list, or add a new user.
   - Click an existing user, and click **Save**.
   - Click **Add New User**, fill in the user's details and click **Add** > **Save**.

The invoice emails that are sent from this service will now reach the users you specified.

7 Managing Your Network

On the **Network** page, you can manage information related to your buyers and suppliers, share information with your business partners, create campaigns to invite your business partners to use Basware Network, and collect helpful statistics about your campaigns. You can access the functionalities of the **Network** page by opening the different tabs:

Overview	On the **Overview** tab, you can see an overview of your customers and vendors. You can see, for example, how many of your customers or vendors can send or receive invoices, how many of them have recently updated their company profile, and which Basware services your they use.
Customers	On the **Customers** tab, you can manage your network of customers. If you want to import your customers' details into Basware Network, you can download and fill out a Partner List Template and import their details using the import tool.
Vendors	On the **Vendors** tab, you can manage your network of suppliers and share information with them. If you want to import your suppliers' details into Basware Network, you can download and fill out a Partner List Template and import their details using the import tool.
Campaigns	On the **Campaigns** tab, you can create and manage campaigns and download statistics about the campaign participants. You can view the statuses of all your campaigns, restart expired campaigns, or schedule campaigns to start in the future.
Business Directory	On the **Business Directory** tab, you can view and search for companies that have a public profile in the Basware Network.

The Business Directory tab is visible to users with Company Administrator credentials, only.

7.1 Configuring the service settings

Users with Company Administrator privileges can customize the way Vendor Manager works.

Adding vendors

By default, companies can add new vendors to their network only by sending out invitations to their business partners. By setting up a customizable **Vendor approval process**, you can enable users from your company to suggest new vendors to your company in a way that matches your company's internal process requirements.

Vendor information templates

If your company deals with multiple vendors from various fields, you may require different type of information from vendors from each fields. Through service settings, you can create multiple vendor information templates that define what type of information you require from each vendor group.

The first template on the list of templates, *approval template*, is used in the approval process of vendor proposals. The other templates on the list are used for onboarding templates through, for example, invitation campaigns.

Data verification and enrichment

To make sure you always have correct and up-to-date data about your vendors, you can have your vendor data verified and enriched through Dun and Bradstreet.

7.1.1 Activate vendor approval process

By default, companies can add new vendors to their network only by sending out invitations to their business partners. By setting up a customizable **Vendor approval process**, you can enable users from your company to suggest new vendors to your company in a way that matches your company's internal process requirements.

1. As a Company Administrator, click **Services**.
2. Under **Vendor Information Management**, click **Vendor Manager**.
3. Click **Vendor approval process** to expand the section.
4. Tick the **I want to approve all the vendors I add to my network** checkbox to activate the vendor approval feature.
5. On the **Process configuration** section, click .
6. Under **Process configuration**, select the features you want to activate:

Manually approve changes vendors have made to their company information	Activate this feature, if you want to manually approve each change your vendors make to their information before the information is published.
Allow users to create vendor requests	Activate this feature to enable users from your company to suggest new vendors to your company by creating a vendor request.

7. Click **Save** to save the changes or **Cancel** to cancel the operation.

Once you have activated the vendor approval process, you can add reviewers to manually approve information changes and vendor requests, and configure approval flows

7.1.2 Add reviewers

1. As a Company Administrator, click **Services**.
2. Under **Vendor Information Management**, click **Vendor Manager**.
3. Click **Vendor approval process** to expand the section.
4. On the **Reviewers** section, click +.
5. In the **User** field, enter the name of the person you want to act as a reviewer.
6. Click **Save** to save the changes or **Cancel** to cancel the operation.
7. Repeat steps 3-6 to add more reviewers.

7.1.3 Create approval flows

1. As a Company Administrator, click **Services**.
2. Under **Vendor Information Management**, click **Vendor Manager**.
3. Click **Vendor approval process** to expand the section.
4. On the **Approval flows** section, click +.
5. Enter the basic details of the flow.

   Flow name Name of the new approval flow. Shown on the list of available approval flows.

   Category Category of the new approval flow.

   > Vendor categories drive the approval flow process. Different vendor categories can have different approval flows.

   Description General description of the new approval flow.

6. On the **Steps** section, click + to add a new review step.
7. Under **Step label**, enter a name for this review step.
8. Click **Add** and enter the name of the person you want to act as the reviewer for this step.

   You can add multiple reviewers for each step.
9. Click **Save** to save this step or **Cancel** to cancel the operation.
10. On the **Steps** section, click + to add an additional review step.

    You can add as many review steps as you require.
11. Click **Save** at the bottom of the panel to save the review flow you created, or **Cancel** to cancel the operation.

7.1.4 Create information request templates

Use information request templates to define what type of information your company needs from its suppliers.

1. As a Company Administrator, click **Services**.
2. Under **Vendor Information Management**, click **Vendor Manager**.
3. Click **Vendor information request templates** to expand the section.
4. Click + to create a new information request template.
5. In the **Template name** field, add a name for the new template.
6. In the **Description** field, add a description of
7. Tick the **I want to be notified by email about all changes from vendors** checkbox to receive a notification every time one of your vendors updates their company information.
8. In the company information sections, tick the fields that you want your vendors to fill in.

   You can define fields as both optional and mandatory depending on your needs.
9. Click **Save** at the bottom of the panel to save the information request template you created, or **Cancel** to cancel the operation.

7.1.5 Remove information request templates

1. As a Company Administrator, click **Services**.
2. Under **Vendor Information Management**, click **Vendor Manager**.
3. Click **Vendor information request templates** to expand the section.
4. On row of the information request template you want to remove, click

7.1.6 Configure vendor notifications

1. As a Company Administrator, click **Services**.
2. Under **Vendor Information Management**, click **Vendor Manager**.
3. On the **Vendor notifications** row, click .
4. To enable notifications, tick the **Notify vendors for expired documents** checkbox.
5. From the **Notification date** list, select the date at which the service sends a notification to the vendors.
6. To send weekly reminders after the expiration date, tick the **Send weekly reminders after the expiry date, until the documents have been updated** checkbox.

7. Click **Save** to save the changes, or **Cancel** to cancel the operation.

7.2 Adding new vendors to your network

There are two main ways in which new vendors can be added to your company's network. The service has a vendor creation and approval feature, with which internal users can request new vendors to be added to the company's vendor network.

Another way to add new vendors to your company's network is to create a goal-driven campaign and to invite vendors create company profiles into Basware Network.

7.2.1 Import new vendors

You can add new vendors to be added to your company's network by importing the vendors' details into Baseware Network. After the import, each vendor will be reviewed and approved according to the approval flow process your company has set up.

1. Create a partner list.
2. Import your vendors' details.

7.2.1.1 Create a partner list

If you want to import several business partners' details to the service at once, you can download a **Partner List Template** from **Basware Network**, enter your business partners' details onto the template and upload it to the service.

1. Log into **Basware Network**.
2. At the top of the page, click **Network** to open the **Network** page.
3. Select the type of business partners that you want to import.
   - To import suppliers, Click **Vendors**.
   - To import customers, Click **Customers**.
4. Open the Import dialog.
   - If you chose to import suppliers, click **Actions** > **Import Vendors**.
   - If you chose to import customers, click **Actions** > **Import Customers**.
5. In the Import dialog, click **Partner List Template**.
6. Save the **Partner List Template** on your local hard drive.
7. Open the **Partner List Template**.
8. Enter your business partners' details on the **Partner List Template**.

   For descriptions of the columns used on the partner list, see File format of the partner list.

9. Save and close the **Partner List Template**.

   You can now import your business partners' details into **Basware Network**.

7.2.1.2 Import your business partners' details

You can add multiple business partners' information into Basware Network by uploading a valid partner list.

1. Log into Basware Network.
2. At the top of the page, click **Network** to open the **Network** page.
3. Select the type of business partners that you want to import.
   - To import suppliers, Click **Vendors**.
   - To import customers, Click **Customers**.
4. Open the Import dialog.
   - If you chose to import suppliers, click **Actions** > **Import Vendors**.
   - If you chose to import customers, click **Actions** > **Import Customers**.
5. In the Import dialog, click **Browse...**.
6. Locate your partner list and click **Open**.

   If you do not have a partner list, you can create one first.
7. Click **Import**.

   Once the file is imported, you can view the import summary under **Import Summary**.

7.2.1.3 File format of the partner list

You can import several partners' details into **Basware Network** simultaneously using a CSV formatted partner list. The partner list must:

- be properly formatted and contain all mandatory details
- contain one **Company Information** group, and at least one instance of **Address Information**, **Contact Information** and **Bank Account Information** groups.
- contain one header row that contains the column names described in the **Column Name** columns in the tables below.

Currently, **Basware Network** accepts partner lists exported from SAP by default. If you want to upload a partner list exported from another Enterprise Resource Planning (ERP) tool, make sure that the partner list uses the column names and file structure described below.

Once you have created the partner list, you can import your partners' details into **Basware Network**.

Company Information

The first group of columns in the partner list contain the basic details about your partner. This group consists of **six** columns, and it must appear once in the CSV file.

Table 3: Company Information

Column Name	Description	Mandatory
erpId	Partner's identifier in your ERP system.	✓
partnerName	Official name of your partner.	✓
countryOfRegistration	Partner's country of registration.	✓
partyId	Partner's identifier. This may be the partner's VAT number, sales tax number, taxpayer identification number (TIN), or other public identification number. The CSV file must contain either this column, or the **contactElectronicMail** column.	(✓)
GLN	Partner's Global Location Number (GLN).	
DUNS	Partner's Data Universal Numbering System (DUNS) number.	

Contact Information

The contact information group contains your partner's contact information. This group consists of **five** columns. The group must be used at least once in the partner list, and the group can be repeated **three** times. This means that you can store three sets of contact details for each partner.

Table 4: Contact Information

Column Name	Description	Mandatory
contactType	Description of this contact	
contactName	Name of the contact	
contactElectronicMail	Email address The CSV file must contain either this column, or the **partyId** column.	(✓)
contactTelephone	Telephone number	
contactTelefax	Telefax number	

Address Information

Second group of columns store the partner's address. This group consists of **six** columns. The group must be used at least once in the partner list, and the group can be repeated **three** times. This means that you can store three different addresses for each partner.

Table 5: Address Information

Column Name	Description	Mandatory
addressType	Type of address. Here, you can define if this is a remit-to address, invoice address, or an other type of address.	
cityName	City	
postalZone	Postal code	
addressLine	Street address	
countryId	Country	
countrySubentity	State, county, or other subentity	

Bank Account Information

The bank account information group contains information about the partner's bank accounts. This group consists of **nine** columns. The group must be used at least once in the partner list, and the group can be repeated **three** times. This means that you can store three sets of bank account details for each partner.

Table 6: Bank Account Information

Column Name	Description	Mandatory
bankName	Name of the partner's bank	
BankBranchNumber	Number of the bank's branch	
bankBranchName	Name of the bank's branch	
bankBranchAddress	Address of the bank	
swiftCode	SWIFT code of the partner's bank	
iban	Partner's bank account number in IBAN format	
accountNumber	Partner's bank account number	
accountHolderName	Account holder's name	
currency	Currency of the bank account	

7.2.2 Invite new vendors

You can invite new businesses to register as your company’s vendors by creating a goal-driven campaign and inviting them to share their company details with you in Basware Network.

For detailed instructions, see the Creating Goal-Driven Campaigns User Guide.

7.2.3 Create a vendor proposal

If you want a new vendor to be added to your company’s network, you can create a vendor proposal. If the vendor proposal is approved by your company’s reviewers, the company you propose will be added to your company’s network.

1. Log into Basware Network.
2. Click **Network**.
3. On the panel on the right, under **Create new vendor proposal**, click **Create proposal**.
4. On the **New vendor proposal** page, enter the name of the vendor you want to propose in the search field and click .
5. Click **Create new proposal**.
6. Fill in the vendor's details.
7. Click **Send for review**.

7.2.4 Reviewing and approving vendor proposals

If your company has enabled it's users to propose new vendors, you may be required to review and approve vendor proposals.

Each new vendor proposal you receive will appear on the **My Tasks** view on the **Dashboard**. From there, you can easily review and approve each vendor with just a few clicks.

7.2.4.1 Review vendor proposals

Each new vendor proposal you receive will appear on the **My Tasks** view on the **Dashboard**. From there, you can easily review each proposal.

1. Log into Basware Network.
2. Under **New vendor proposals for review**, click **Review proposals**.
3. On the list of vendors shown on the **My Vendors** page, choose the vendor you want to review and click **Review**.
4. Under **Administrative information**, update the category of the vendor, if necessary.
5. Under **Basic company details**, review the vendor's information.
6. Click **Send to approval** > **Approve** to proceed with the vendor approval process, or **Send to approval** > **Reject** if you want to reject this proposal.

   When you reject a proposal at this stage, the is set to *Needs update* status. The service sends an email to the creator of the proposal and informs them that the proposal has been rejected in the review. After this, the creator of the proposal can make changes to the proposal and resend it to the approval workflow.

7.2.4.2 Approve vendor proposals

Each new vendor proposal you receive will appear on the **My Tasks** view on the **Dashboard**. From there, you can easily approve each proposal.

1. Log into Basware Network.
2. Under **Vendors await your approval**, click **Approve proposals**.
3. On the list of vendors shown on the **My Vendors** page, choose the vendor you want to approve and click **Review**.
4. Go through the vendor's information.
5. Click **Approve** to approve the vendor proposal, or **Reject** if you want to reject this proposal.

   When you reject a proposal at this stage, the proposal cannot be edited or sent to the approval workflow again. The service sends an email to the creator of the proposal and informs them that the proposal has been rejected in the approval stage.

7.3 Using MasterCard Track™

MasterCard Track™ is an optional verification service that your company can purchase as part of the Vendor Lifecycle Management package. The service lets you verify your vendors against MasterCard's expansive list of vendor data.

7.3.1 Activate the MasterCard Track™ service

1. Log into Basware Network.
2. As a Company Administrator, click **Services**.
3. Under **Vendor verification and data enrichment**, click the **Verify my vendor using MasterCard Track™** slide toggle.

7.3.2 Verify a vendor using MasterCard Track™

1. Log into Basware Network.
2. Click **Network**.
3. Click **Vendors**.
4. On the list of vendors, choose the vendor you want to verify and click **Verify with Track**.

   The service shows a high level verification result below the vendor's basic details.

5. To open a detailed report, click the name of the vendor.
6. Under **Score**, review the report from MasterCard Track.
7. To view information about sanction lists the vendor is placed on, click **Sanctions.**

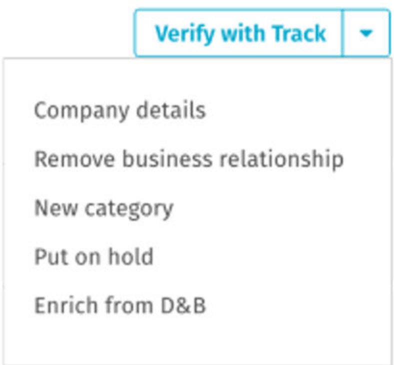
   The **Sanctions** page opens and shows a list of sanction lists the vendor is currently placed on. To view more information regarding a sanction, click **Learn more** to open an external page with a details sanction report.
8. Under **Compliance**, check other compliance information related to this vendor.

   Mastercard Track™ provides you with compliance information in the following categories:
   - Politically exposed persons
   - Financial regulations
   - Law enforcement
   - Disqualified directors
   - Insolvencies
   - Adverse media
   - Global individual checks
9. Click the back arrow to return to the list of vendors.

7.3.3 Place a vendor on hold

If you want to prevent purchases from a certain vendor, you can place these vendors on hold. This prevents users from making purchases from the vendor.

1. Log into Basware Network.
2. Click **Network**.
3. Choose the vendor you want to place on hold.
4. Click the down arrow button to open a list of options.



5. Click **Put on hold** to place the vendor on hold and prevent future purchase from them.

8 Goal-driven campaigns

You can use goal-driven campaigns to invite a number of your suppliers and customers to get to know and to adopt Basware services.

Campaign goals

Goal-driven campaigns are based on a goal that you wish to achieve through that campaign. You may, for example, want to:

- start receiving electronic invoices from your suppliers
- sign new early payment agreements
- setup dynamic discounting programmes
- update and enrich supplier data

Campaign types

Basware Campaigns tool lets you create different types of goal-driven campaigns based on what the needs of your business are:

Table 7: Campaign types

Type	Invitation method	Landing page
Full Basware solution	Basware invitations	Basware landing page
Basware landing page only	Own invitation method	Basware landing page
Own invitations and landing page	Own invitation method	Own landing page

8.1 Creating and managing campaigns

You can create and manage goal-driven campaigns on the **Campaigns** page. There, you can:

- Create a campaign using Basware landing page and invitation emails
- Create a campaign using Basware landing page and your own invitation method
- Create a campaign using your own landing page and invitation method
- End a campaign
- Restart an expired campaign
- Download and examine campaign reports

8.2 Create a campaign using Basware landing page and invitation emails

To create a campaign that uses a landing page provided by Basware and invitations sent through Basware Network:

1. Create a campaign and set campaign goal(s)
2. Set the campaign's parameters
3. Choose the invitees
4. Set up a landing page for the campaign
5. Set up the invitation
6. Review the information and start the campaign.

8.2.1 Create campaign and set campaign goals

1. Log into Basware Network.
2. Click **Network** > **Campaigns**.
3. Click **Create New Campaign**.
4. To offer an early payment option to your suppliers, select **Get discount on early payments**.

   When you select this option, you must set the following parameters:

   - **Discount rate in %**: The maximum discount rate you want to receive in exchange for early payment.
   - **Set payment term in days**: Payment term in days.

   You must also define how the early payment option works from the supplier's perspective:

   - **On demand (Flexible)**: The supplier can decide whether they want to receive an early payment separately for each eligible invoice. The supplier can switch to using the automatic mode.
   - **Automatic (Flexible)**: Each invoice the supplier sends is automatically directed to early payment. The supplier can switch to using the On demand mode.
   - **Automatic (Fixed)**: Each invoice the supplier sends is automatically directed to early payment. The supplier cannot switch to using the On demand mode.
5. To promote e-invoicing to your suppliers, select **Promote e-invoicing to enable automation**.

   When you select this option, you must set the following parameters:

   - **Activate suppliers in %**: Define the target rate of suppliers who switch to sending e-invoices through this campaign.
6. To update and enrich your supplier's information, select **Update and enrich supplier data**.

   When you select this option, you must set the following parameters:

   - **Select template**: Select a template that defines the details your suppliers need to update.
   - **Updated data in %**: Define the target rate of requested details that your suppliers fill in or update.

7. Click **Set as Primary** next to the goal you want to set as the primary goal of your campaign.
8. Click **Next** to set the campaign parameters.

8.2.2 Set campaign parameters

1. In the **Campaign name** field, enter a name for the campaign.
2. Set the start and the end dates for the campaign.
   a) Click the **Start date** field to set a start date for the campaign.
   b) Click the **End date** field to set an end date for the campaign.
3. Select **I want to use the standard landing page**.
4. Under **Select invitation method**, select **Email - Basware delivers the link to the landing page to the invitees (RECOMMENDED)**.
5. To use email addresses stored in Basware Network, tick the **Use Basware emails** checkbox.
6. Click **Next** to choose the invitees.

8.2.3 Choose invitees

1. Import invitees from CSV files (optional).
   a) Click **Import CSV file** to expand the **Import CSV file** section.
   b) To import a CSV file, click **Select files** or drag and drop a CSV file to the **Drop your file here** section.
   c) From the **Email Language** drop-down list, select the language of the email message you want to send to these recipients.

   You can upload up to 20 CSV files. You can define the language for each CSV file that you import separately.

   d) Repeat the process to create additional groups of invitees.
2. Define invitees by pasting their email addresses (optional).
   a) Click **Paste multiple mails** to expand the **Paste multiple mails** section.
   b) Paste a group of email addresses in the **Email addresses** textbox.

   Each email address that you paste at a time will be grouped together and each invitee will receive the invitation in the same language.

   c) Click **Review and add**.
   d) From the **Language** drop-down list, select the language of the invitation you want to send to these invitees.
   e) Repeat the process to create additional groups of invitees.

3. Add invitees by manually entering their details (optional).
   a) Click **Add single recipient** to expand the **Add single recipient** section.
   b) Enter the invitee's details in the **First Name**, **Last Name** and **Email Address** fields.
   c) Click **Add**.
   d) From the **Language** drop-down list, select the language of the invitation you want to send to this invitee.
   e) Repeat the process to add more invitees.
4. Click **Next** to set up the landing page.

8.2.4 Set up the landing page

1. Click **Select a file** or drag and drop your company's logo to the **Company logo file** section (optional).

   > If you want to add your company's logo to the landing page, you must also add a custom message to the landing page, too.

2. To add a custom message to the landing page, enter the message in the **Your message** text box (optional).
3. Click **Preview** to preview the landing page.
4. Click **Next** to set up the invitation.

8.2.5 Set up the invitation

1. In the **Reply-to email** field, enter the *reply-to* address.
2. Add your company's logo to the email message (optional).
   a) Tick the **Use company logo in invitation email** checkbox.
   b) Click **Select a file** or drag and drop your company's logo to the **Specify another company logo** section.
3. Add attachments to the email message (optional).
   a) Click **Select files** or drag and drop your company's logo to the **Attachments** section.
4. Click **Preview email** to preview the email before you send it.
5. Click **Send email** to send a test invitation.

   Enter the address to which you want to send the test email in the **Email address** field and click **Send**.
6. Click **Next** to review the campaign details.

8.2.6 Review campaign details and start the campaign

1. Review the campaign details.

   Click **Previous** to go back and make changes to the information you provided, if needed.
2. Under **Select languages to start campaign**, select the languages that the campaign is presented in.
3. Click **Complete** to start the campaign.

8.3 Create a campaign using Basware landing page and your own invitation method

To create a campaign using Basware provided landing page and your own invitation method:

1. Create a campaign and set campaign goal(s)
2. Set the campaign's parameters
3. Set up a landing page for the campaign
4. Review the information and start the campaign.

8.3.1 Create campaign and set campaign goals

1. Log into Basware Network.
2. Click **Network** > **Campaigns**.
3. Click **Create New Campaign**.
4. To offer an early payment option to your suppliers, select **Get discount on early payments**.

   When you select this option, you must set the following parameters:
   - **Discount rate in %**: The maximum discount rate you want to receive in exchange for early payment.
   - **Set payment term in days**: Payment term in days.

   You must also define how the early payment option works from the supplier's perspective:
   - **On demand (Flexible)**: The supplier can decide whether they want to receive an early payment separately for each eligible invoice. The supplier can switch to using the automatic mode.
   - **Automatic (Flexible)**: Each invoice the supplier sends is automatically directed to early payment. The supplier can switch to using the On demand mode.
   - **Automatic (Fixed)**: Each invoice the supplier sends is automatically directed to early payment. The supplier cannot switch to using the On demand mode.

5. To promote e-invoicing to your suppliers, select **Promote e-invoicing to enable automation**.

   When you select this option, you must set the following parameters:

   - **Activate suppliers in %**: Define the target rate of suppliers who switch to sending e-invoices through this campaign.

6. To update and enrich your supplier's information, select **Update and enrich supplier data**.

   When you select this option, you must set the following parameters:

   - **Select template**: Select a template that defines the details your suppliers need to update.
   - **Updated data in %**: Define the target rate of requested details that your suppliers fill in or update.

7. Click **Set as Primary** next to the goal you want to set as the primary goal of your campaign.
8. Click **Next** to set the campaign parameters.

8.3.2 Set campaign parameters

1. In the **Campaign name** field, enter a name for the campaign.
2. Set the start and the end dates for the campaign.

   a) Click the **Start date** field to set a start date for the campaign.

   b) Click the **End date** field to set an end date for the campaign.

3. Select **I want to use the standard landing page**.
4. Under **Select invitation method**, Select **No email. I will contact the supplier myself**.
5. In the **Specify campaign URL** field, define the URL that you want to use for the campaign.

   The full URL follows the format: `https://portal.basware.com/open/<specified URL>`. For example, `https://portal.basware.com/open/acme-einvoicing-campaign`.

   ---

6. Click **Validate** to make sure that the URL you specified is accessible.
7. From the **Language** drop-down list, select the language you want to use in the invitation.
8. Click **Next** to set up the landing page.

8.3.3 Set up the landing page

1. Click **Select a file** or drag and drop your company's logo to the **Company logo file** section (optional).

   If you want to add your company's logo to the landing page, you must also add a custom message to the landing page, too.

2. To add a custom message to the landing page, enter the message in the **Your message** text box (optional).
3. Click **Preview** to preview the landing page.
4. Click **Next** to review the campaign details.

8.3.4 Review campaign details and start the campaign

1. Review the campaign details.

   Click **Previous** to go back and make changes to the information you provided, if needed.
2. Under **Select languages to start campaign**, select the languages that the campaign is presented in.
3. Click **Complete** to start the campaign.
4. Deliver the URL you chose when you set the campaign parameters to the recipients.

8.4 Create a campaign using your own landing page and invitation method

To create a campaign using Basware provided landing page and your own invitation method:

1. Create a campaign and set campaign goal(s)
2. Set the campaign's parameters
3. Review the information and start the campaign.

8.4.1 Create campaign and set campaign goals

1. Log into Basware Network.
2. Click **Network** > **Campaigns**.
3. Click **Create New Campaign**.

4. To offer an early payment option to your suppliers, select **Get discount on early payments**.

   When you select this option, you must set the following parameters:

   - **Discount rate in %**: The maximum discount rate you want to receive in exchange for early payment.
   - **Set payment term in days**: Payment term in days.

   You must also define how the early payment option works from the supplier's perspective:

   - **On demand (Flexible)**: The supplier can decide whether they want to receive an early payment separately for each eligible invoice. The supplier can switch to using the automatic mode.
   - **Automatic (Flexible)**: Each invoice the supplier sends is automatically directed to early payment. The supplier can switch to using the On demand mode.
   - **Automatic (Fixed)**: Each invoice the supplier sends is automatically directed to early payment. The supplier cannot switch to using the On demand mode.
5. To promote e-invoicing to your suppliers, select **Promote e-invoicing to enable automation**.

   When you select this option, you must set the following parameters:

   - **Activate suppliers in %**: Define the target rate of suppliers who switch to sending e-invoices through this campaign.
6. To update and enrich your supplier's information, select **Update and enrich supplier data**.

   When you select this option, you must set the following parameters:

   - **Select template**: Select a template that defines the details your suppliers need to update.
   - **Updated data in %**: Define the target rate of requested details that your suppliers fill in or update.
7. Click **Set as Primary** next to the goal you want to set as the primary goal of your campaign.
8. Click **Next** to set the campaign parameters.

8.4.2 Set campaign parameters

1. In the **Campaign name** field, enter a name for the campaign.
2. Set the start and the end dates for the campaign.

   a) Click the **Start date** field to set a start date for the campaign.

   b) Click the **End date** field to set an end date for the campaign.
3. Select **I want to use my own landing page**.
4. In the **URL of the landing page** field, enter the URL of the landing page.

5. Click **Validate** to make sure the URL is correct.

When you use a landing page you have setup yourself, make sure that the landing page directs the users to `https://portal.basware.com/join`. Otherwise, the users you invite will not be able to reach the Basware service selection page.

---

6. Under **Select invitation method**, select **No email. I will contact the supplier myself**.
7. In the **Specify campaign URL** field, define the URL that you want to use for the campaign.

The full URL follows the format: `https://portal.basware.com/open/<specified URL>`. For example, `https://portal.basware.com/open/acme-einvoicing-campaign`.

---

8. From the **Language** drop-down list, select the language you will use in the invitation.
9. Click **Next** to review the campaign details .

8.4.3 Review campaign details and start the campaign

1. Review the campaign details.

   Click **Previous** to go back and make changes to the information you provided, if needed.
2. Under **Select languages to start campaign**, select the languages that the campaign is presented in.
3. Click **Complete** to start the campaign.
4. Deliver the URL you chose when you set the campaign parameters to the recipients.

8.5 End a campaign

You can end a campaign before the campaign's original end date on the **Network** page.

1. On the **Campaigns** view, scroll down to the campaign you want to end.
2. In the **Action** column, click **End now** to end the campaign.

8.6 Restart an expired campaign

Tou can restart an expired campaign by editing the start and end dates of the campaign. Manage open campaigns on the **Network** page.

1. On the **Campaigns** view, scroll down to the open campaign you want to restart.
2. In the **Action** column, click **Edit**.
3. Click the **Start date** and **End date** fields to set a new start date and an end date for the campaign.
4. Click **Save** to save your changes and restart the campaign.

8.7 Campaign statistics

8.7.1 Download campaign statistics

You can download campaign statistics on the **Network** page. Campaign statistics collect information about the users who participated in a campaign. From campaign statistics, you can see for example:

- the type of the campaign
- when the invitations for the campaign were sent
- the names and contact information of the invitees
- when the invitees joined the campaign.

1. On the **Campaigns** view, scroll down to a campaign.
2. In the **Action** column, click **Download**. If the campaign has expired, select **Download** from the drop-down list.

   You can also download a collection of the statistics of all active campaigns by clicking **Download all**.

   A CSV file that contains the campaign statistics is downloaded to your device.

8.7.2 Examining campaign statistics

Basware Network collects details about each campaign that you run using the campaign tool. You can download each campaign's statistics in Basware Network and examine the results. For descriptions of all columns used on the campaign report, see Contents of a campaign report.

Email-based campaigns

The most relevant parts of the campaign report for email based campaigns are columns L-O and columns P-X.

Table 8: User progress after they have received an invitation email

Column	Field content	Information
L	Invitation email sent	Contains the timestamp of when the invitation email was sent to the invitee. If the invitee proceeds to click the invitation link within a week, the next timestamp the service logs is in column P.
M, N, O	Timestamps of the first, second, and third reminder messages	If the invitee does not open the invitation link within a week, the service will send them three reminders. The times at which the reminders have been sent will be logged in columns M, N, and O. Once the invitee opens the link to the registration page of the service, their progress is tracked within columns P-X.

Once the user clicks the link in either the original invitation or one of the reminder messages, their progress will be tracked in columns P-X:

Table 9: User progress on the registration page

Column	Field content	Information
P	Registration page reached	This column contains the timestamp of when the user has opened the registration page of a service. If the user has not yet opened the registration page, this field will contain the value FALSE.
Q	Offering page reached	This column contains the timestamp of when the invitee has accessed the offering page. If the user has not yet opened the offering page, this field will contain the value FALSE.

Column	Field content	Information
R	Rejected	If the invitee already has an e-invoicing system or they have chosen not to accept any of the offered services, then this field will contain the value TRUE.
S	Create password page reached	Contains the timestamp of when the invitee accessed the create account page and entered a valid email address and a password for starting the registration process.
T	Waiting account confirmation	Contains the timestamp of when Basware Network issued a confirmation email - an email with a link the user clicks to confirm their account - to the invitee. If the previous column contains a timestamp, but this column contains the value FALSE: • The invitee already has a user account in Basware Network. Check column V. • The invitee has accessed the registration page but has chosen not to create a user account.

Column	Field content	Information
U	Account confirmed	Contains the timestamp of when the user has confirmed their user account by clicking the link in the account confirmation email that Basware Network has sent them. If the previous column contains a timestamp, but this column contains the value FALSE: • The invitee already has a user account in Basware Network. Check column V. • The invitee has created an account but have not yet confirmed the user account.
V	Account used	Contains the timestamp of when the user logged into Basware Network for the first time.
W	Service activated	Contains the timestamp of when the user successfully completed the configuration of the service they were invited to and activated the service. If there is a timestamp in column V but none in this column, the user has started the registration process, but has not finished filling in their organization details or activated the service.

Column	Field content	Information
X	Service used	Contains the timestamp of when the first invoice was successfully processed and delivered to the client. If the invitee has sent an invoice to a business unit different from the one that invited them, then this field will contain the value FALSE.

URL-based campaigns

The most interesting parts of the campaign report are columns P-X.

Once the user opens the URL that they received, their progress will be tracked in columns P-X:

Table 10: User progress on the registration page

Column	Field content	Information
P	Registration page reached	This column contains the timestamp of when the user has opened the registration page of a service. If the user has not yet opened the registration page, this field will contain the value FALSE.
Q	Offering page reached	This column contains the timestamp of when the invitee has accessed the offering page. If the user has not yet opened the offering page, this field will contain the value FALSE.
R	Rejected	If the invitee already has an e-invoicing system or they have chosen not to accept any of the offered services, then this field will contain the value TRUE.
S	Create password page reached	Contains the timestamp of when the invitee accessed the create account page and entered a valid email address and a password for starting the registration process.

Column	Field content	Information
T	Waiting account confirmation	Contains the timestamp of when Basware Network issued a confirmation email - an email with a link the user clicks to confirm their account - to the invitee. If the previous column contains a timestamp, but this column contains the value FALSE: • The invitee already has a user account in Basware Network. Check column V. • The invitee has accessed the registration page but has chosen not to create a user account.
U	Account confirmed	Contains the timestamp of when the user has confirmed their user account by clicking the link in the account confirmation email that Basware Network has sent them. If the previous column contains a timestamp, but this column contains the value FALSE: • The invitee already has a user account in Basware Network. Check column V. • The invitee has created an account but have not yet confirmed the user account.
V	Account used	Contains the timestamp of when the user logged into Basware Network for the first time.

Column	Field content	Information
W	Service activated	Contains the timestamp of when the user successfully completed the configuration of the service they were invited to and activated the service. If there is a timestamp in column V but none in this column, the user has started the registration process, but has not finished filling in their organization details or activated the service.
X	Service used	Contains the timestamp of when the first invoice was successfully processed and delivered to the client. If the invitee has sent an invoice to a business unit different from the one that invited them, then this field will contain the value FALSE.

8.7.3 Contents of a campaign report

You can download campaing reports in CSV format. The CSV file is made up of several columns that you can use to examine the campaign.

Note that while the columns used on the campaign report are same for each campaign type, the information stored in certain columns will only be applicable to specific campaign types. If a column is applicable to a specific campaign type only, this will be noted in the table below.

CSV column	Field content	Comment
A	Campaign Type	Describes whether this is an open, URL-based campaign or an email-based campaign.
B	Campaign name	Contains the name or the label of the campaign that was given when the campaign was created
C	Application name	Contains the name of the Basware service that the campaign was created for
D	Invitee ID	Contains the unique Portal identifier number.

CSV column	Field content	Comment
E	Invitee Party ID	Contains the identifier and scheme given by the invitee (For example, VAT-ID, DUNS number) both during the onboarding process and later on when they have edited their company details
F	Invitee Country	Contains the country selected by the invitee during the registration process.
G	Invitee Name	Contains the name given by the invitee during the registration process
H	Invitation Name	Contains the name of the person the invitation was issued to. This field is applicable to email-based campaigns only.
I	Invitation Email	Contains the email address the invitation was issued to. This field is applicable to email-based campaigns only.
J	Contact Email	Contains the email address of the person, who was set as the main point of contact for the invitee company during the onboarding process
K	Invitation URL	Contains the unique token link that is used for tracking the invitation. This field is applicable to email-based campaigns only. In URL-based campaigns, the service creates a token only when a user visits the registration page of the campaign
L	Invitation email sent	Contains the timestamp of when the invitation email was sent to the invitee. This field is applicable to email-based campaigns only.
M	First reminder sent	Contains the timestamp of when the first reminder was sent to the invitee. This field is applicable to email-based campaigns only.

CSV column	Field content	Comment
N	Second reminder sent	Contains the timestamp of when the second reminder was sent to the invitee. This field is applicable to email-based campaigns only.
O	Third reminder sent	Contains the timestamp of when the third and final reminder was sent to the invitee. This field is applicable to email-based campaigns only.
P	Registration page reached	Contains the timestamp of when the invitee accessed the registration page of the campaign
Q	Offering page reached	Contains the timestamp of when the invitee accessed the offering page of the campaign
R	Rejected	Contains information on whether the invitee rejected the invitation or not
S	Create account page reached	Contains the timestamp of when the invitee accessed the account creation page
T	Waiting account confirmation	Contains the timestamp of when the user entered their username and password, and when Basware Network issued a confirmation email - an email with a link the user clicks to confirm their account - to the invitee.
U	Account confirmed	Contains the timestamp of when the user confirmed their user account by clicking the confirmatiuon link in the confirmation email they received
V	Account used	Contains the timestamp of when the user logged into Basware Network for the first time
W	Service activated	Contains the timestamp of when the user successfully completed the configuration of the service they were invited to and activated the service
X	Service used	Contains the timestamp of when the first invoice was successfully processed and delivered to the client. If the invitee has sent an invoice to a business unit different from the one that invited them, then this field will contain the value FALSE.

9 Contacting Your Business Partner

The optional **Collaborate** tool lets you contact your business partner directly through the service if you have any comments or questions related to your business documents.

If both you and your business partner have activated the free collaboration tool, all business documents that you exchange will have a **Discuss this Document** panel. Through this panel, you can send messages related to this particular business document to your business partner. Once you have sent your message, the service instantly notifies your business partner that they have received a message. You, too, will receive an email notification from the service once your business partner replies to your message.

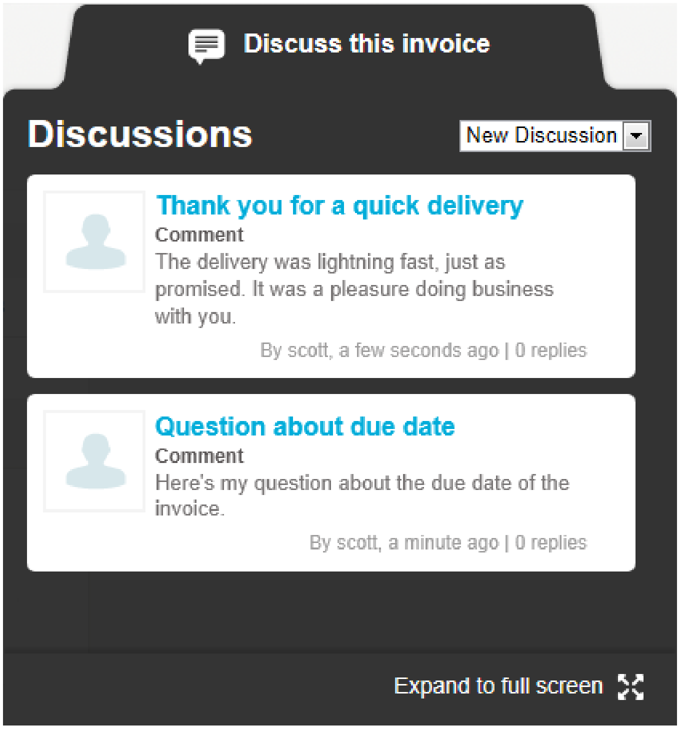


Figure 13: Discussion panel

Each discussion is linked to the business document it was started from, and stored in the service. The discussions remain available to you for as long as you use the service. There is no need to archive the discussions separately.

Each Discussion is presented as a Discussion box in the discussion panel. Clicking on a discussion box opens the full discussion view, and shows you all the messages in the discussion. If there is a large number of discussions related to a single invoice, you can open the Discussion panel to a full screen view. This makes it easier to read through all the discussions.

9.1 Activate the Collaborate service

Before you can send a message to your business partner through the Basware Network, both you and your business partner must activate the Collaborate service.

1. Log into **Basware Network**
2. Click **Services**.
3. Under **General**, click Collaborate.
4. Click **Get Started**.
5. Under **My Account**, fill in your account details and click **Save**.
6. Under **Email notifications**, set your notification preferences and click **Save**.
7. Read the **Basware General Terms** and tick the **I accept the Basware General Terms** checkbox.
8. Click **Activate** to activate the service.

9.2 Send a message to your business partner

This feature is only available to organizations using the **Collaborate** service.

If you have questions or comments related to a business document, you can contact your business partner through the service.

1. Open the business document that you wish to discuss with your business partner.
2. Click **Discuss this Document** to open the discussion panel.

   The **Discuss this Document** panel is not available on draft invoices.

3. From the **New Discussion** drop-down list, select the type of discussion you want to open.

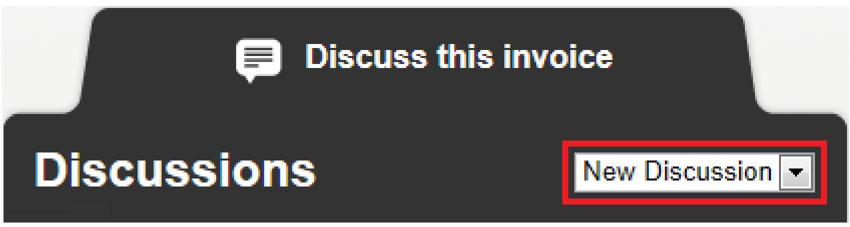


Figure 14: New Discussion drop-down list

4. In the **Topic** field, enter the subject of the message.

5. In the **Comment** field, enter the message to your business partner.
6. Click **Send** to send the message, or **Back** to discard the message.

The service notifies your business partner about your message. Once they reply to your message, the service sends you a notification.

9.3 View a message from your business partner

This feature is only available to organizations using the **Collaborate** service.

Every time your business partner opens a new discussion or sends a reply to an existing discussion, you receive an email notification. This notification contains a direct link to their message.

1. Click on the link in the notification to open Basware Network.

   The login page of Basware Network opens in your default browser.
2. Log in to Basware Network to open the **Discuss this Document** panel.
3. Read the message in the **Discuss this Document** panel.
4. To reply to your business partner, enter your reply in the **Reply** field.
5. Click **Send**.

Basware Network saves your message and notifies your business partner that you have replied to them.

9.4 Set your notification preferences

You can turn notifications about new messages on and off from the **Collaborate** service's **View Details** page.

1. Click **Services**.
2. In the **General** section, select **Collaborate**.

   The service page opens.
3. Click **View Details**.
4. Click **Notifications** to open the email notification settings.
5. Set your notification preferences:
   - To receive notifications about new messages, check the **Activate** checkbox, and enter the email address to which you want to receive notifications in the **Email** field. Click **Save** to save the changes.
   - To disable notifications, uncheck the **Activate** checkbox. Click **Save** to save the changes.

10 Contact Basware Support

If you cannot find the information you are looking for in this document, please have a look at the Online Help. In case you cannot find the information you are looking for there, either, please contact Basware Support. The Basware Support personnel will assist you in using the application and send all suggestions for improvement related to the applications or documentation to the supplier of the system.

To find the contact information of Basware Support, visit Basware Knowledge Base.

You can also contact Basware Support by clicking the Chat tab that is available on each page. This opens the **Chat with Basware Support** popup window that lets you send questions to Basware Support.

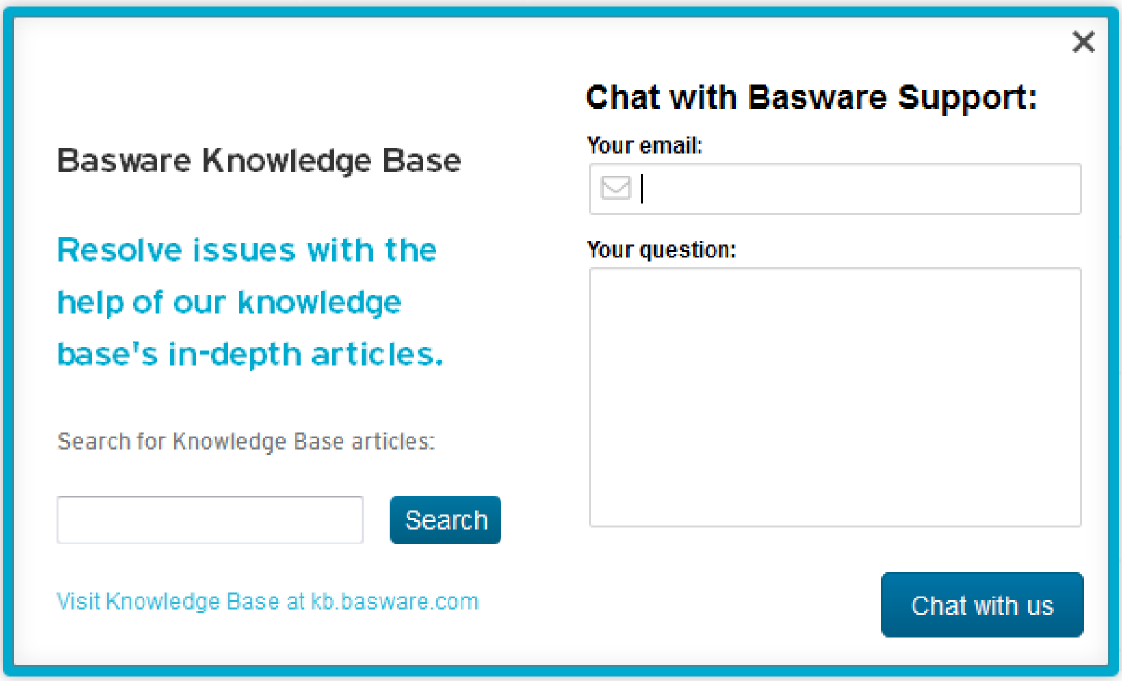


Figure 15: Chat with Basware Support popup window

Appendix A

Technical Requirements

You can view the current technical requirements for Basware products at https://www.basware.com/en-us/technical-requirements.

Appendix B

User roles and rights

Each organization in Basware Network has two types of user roles, *regular users* and *company administrators*. The following table lists the differences in user rights between the two roles.

Table 11: User roles and rights

Action	Regular	Company Administrator
View personal account	•	•
Edit personal account	•	•
View your organization's details	•	•
Edit your organization's details	-	•
View your organization's business documents	•	•
Search for child organizations	•	•
View a child organization's details	•	•
Edit a child organization's details	-	•
View your organization's users' details	•	•
Edit your organization's users' details	-	•
View a child organization's users' details	•	•
Edit a child organization's users' details	-	•

Appendix C

Field Names and Descriptions

This section contains descriptions of the user interface fields of the following areas:

- My Account
- My Organization
- Invoices

C.1 My Account

Table 12: My Account Fields

Field Name	Description	Notes
Username	Your username.	*jenny.sampleperson@mycompany.com* Username is the email address that you used when you registered to Basware Network. You cannot modify your username later on. If you have to reset your password, Basware Network will send the reset link to this address.
Name	Your full name.	*Jenny Sample-Person* Displayed only on the **My Account** page
First Name	Your first name.	*Jenny* Displayed only when you edit your account details
Last Name	Your last name.	*Sample-Person* Displayed only when you edit your account details

Field Name	Description	Notes
Email	Your email address.	*jenny.sampleperson@mycompany.com* Basware Network delivers all notifications related to your user account to this address
Phone	Your phone number.	*555-3226*
Street Address 1	Street address of your office.	*1 Acme Road*
Street Address 2	Additional street address of your office	*Cello Building*
City	The city your office is in	*Acmeville*
ZIP	Zip code of your office.	*90210*
Country	The country of your office.	*United States*

C.2 My Organization

Some of following fields are only shown in the **Edit** view.

Table 13: General Information

Field Name	Description	Notes
Name	Name of your company	*Acme Inc.*
Legal Status	Legal status of your company	For example, *Corporation*, *Collective*
Website	Your company's web address	*www.example.com*
Place of Registration	The city/municipality that your company is registered in	*Townsville*
Organization's Logo	Your company's logo	You can upload a logo in GIF, JPEG, or PNG format.

Table 14: Organization's Identifiers

Field Name	Description	Notes
Organization's Identifier	Organization's identifier is your company's legal identifier provided by and stored in a national or a global business registry. Organization's identifiers help Basware and other companies find and recognize your company in Basware Network. Select the type of organization identifier that your company has from the drop-down list and fill it in the adjacent field. If your organization is located in the European Union, you must fill in a valid **Organization's Identifier**. Without a valid identifier, organizations in the EU can not send invoices.	VAT: *GB999 9999 73* Tax Identification Number: *12-3456789* DUNS: *123456789* GLN/EAN: *1234567890123*

Table 15: International Tax Identifiers

Field Name	Description	Notes
International Tax Identifier	This field is shown if your company has a tax identifier in another country than your company's home country. Select the type of tax identifier from the drop-down list.	VAT: *GB999 9999 73* Tax Identification Number: *12-3456789* DUNS: *123456789* GLN/EAN: *1234567890123*

Table 16: Contact Information

Field Name	Description	Notes
Street Address 1	Your company's street address	*1 Acme Way*
Street Address 2	Your company's street address (Additional field)	*Building 5*
City	Your company's home city	*Townsville*
State	Your company's home state, if applicable	*Calisota*
ZIP	Your company's ZIP code	*90210*
Country	Your company's home country	*United States of America*
Use This Address as the Delivery Address	Checkbox. When checked, this address above will be used as the default delivery address on new business documents.	

Field Name	Description	Notes
Use This Address as the Ship From Address	Checkbox. When checked, this address above will be used as the default ship from address on new business documents.	
Contact Name	The name of your company's contact person	*Jane Smith*
Phone	Your company's phone number	*555-3226*
Fax	Your company's fax number	*555-3227*
Email	Your company's email address	*jane.smith@acmeinc.com*
Use as the default contact email address in new documents	Checkbox. When checked, the email address above will used as your company's default contact email address on new business documents.	
Additional Address Fields		
Department	The department of your customer contact	*Sales Department*
Floor	The floor on which your customer contact is located	*6th floor*
Block Name	The block on which your customer contact is located	*North Block*
Additional Street Name	Additional street address field of your customer contact	*Acme Inc. Business Park*
Region	The region in which your customer contact is located	*Niagara Region*
District	The district in which your customer contact is located	*W1A*

Table 17: Organization's Managing Director and Share Capital

Field Name	Description	Notes
Share Capital	The amount of share capital your company has.	Mandatory value in some countries, for example France
Managing Director	The name of your company's managing director	Mandatory value in some countries, for example Germany

Table 18: Electronic Invoice Endpoint

Field Name	Description	Notes
Type	Drop-down list. Often, your company's identifier, provided by and stored in a national or a global business registry, can be used as your electronic invoice endpoint. Select the type of electronic invoice endpoint that your company uses from the drop-down list.	
Value	Enter your company's electronic invoice endpoint in this field.	VAT: *GB999 9999 73* Tax Identification Number: *12-3456789* DUNS: *123456789* GLN/EAN: *1234567890123*
Name	If your company uses several different electronic invoice endpoints, you can add a descriptive name for each in this field.	*Acme Inc's Primary GLN*
Published	Checkbox. When checked, the endpoint will be shown, for example, in the list of possible recipients along with your company name when suppliers create invoices in Basware Network.	

Table 19: Capabilities

Field Name	Description	Notes
Capabilities	This field lists the actions you can do to each type of business document.	*Invoice: Send, Receive* *Purchase order: Send*

Table 20: Notifications

Field Name	Description	Notes
Pre-approval Required	Checkbox. When checked, Basware Network displays a notification saying that other companies must obtain an approval before sending any documents to this company.	
Email	Email address to which Basware Network sends the notification.	*secretary@mycompany.com*

Field Name	Description	Notes
Language	Language of the notification.	*English (United States)*

Table 21: Banking Details

Field Name	Description	Notes
Account No. *	Bank account number	*32109876543210*
SWIFT/BIC *	Identification code of the bank in SWIFT/BIC format	*WESTBGAV*
IBAN *	Your company's bank account number in the International Bank Account Number (IBAN) format	*GB29NWBK6016133 1926825*
Name	Custom name that helps you recognize the bank account	*My Main Account*
Routing Transit Number	Routing transit number of the bank	*123456789*
* You must fill in at least one of the following fields: **Account No.**, **SWIFT/BIC** or **IBAN**.		

Table 22: Tax Representative

Field Name	Description	Notes
Name	Name of your tax representative	*Acme Inc*
Street Address 1	Your tax representative's street address	*1 Acme Way*
Street Address 2	Your tax representative's street address (Additional field)	*Building 5*
Country	Your tax representative's home country	*United States of America*
Tax Identification Number	Your tax representative's tax identification number	
City	Your tax representative's home city	*Townsville*
State	Your tax representative's home state (if applicable)	*Calisota*
ZIP	Your tax representative's ZIP code	*90210*
Banking Details		
Account No. *	Bank account number	*32109876543210*
SWIFT/BIC *	Identification code of the bank in SWIFT/BIC format	*WESTBGAV*
IBAN *	Bank account number in the International Bank Account Number (IBAN) format	*GB29NWBK60161331926825*
Bank Name	Bank name	
Routing Transit Number	Routing transit number of the bank	*123456789*
* You must fill in at least one of the following fields: **Account No.**, **SWIFT/BIC** or **IBAN**.		

Table 23: Permitted Payees

You can add one or more permitted payees to your company’s profile. When you’re sending an invoice, you can select one of these permitted payees as the payee for the invoice. This indicates that you want a third party to receive the payment for this particular invoice.

Field Name	Description	Notes
Name	Name of a permitted payee	*Acme Inc*
Street Address 1	A permitted payee's street address	*1 Acme Way*
Street Address 2	A permitted payee's street address (Additional field)	*Building 5*
Country	A permitted payee's home country	*United States of America*
Tax Identification Number	A permitted payee's tax identification number	
City	A permitted payee's home city	*Townsville*
State	A permitted payee's home state (if applicable)	*Calisota*
ZIP	A permitted payee's ZIP code	*90210*
Banking Details		
Account No. *	Bank account number	*32109876543210*
SWIFT/BIC *	Identification code of the bank in SWIFT/BIC format	*WESTBGAV*
IBAN *	Bank account number in the International Bank Account Number (IBAN) format	*GB29NWBK60161331926825*
Bank Name	Bank name	
Routing Transit Number	Routing transit number of the bank	*123456789*
* You must fill in at least one of the following fields: **Account No.**, **SWIFT/BIC** or **IBAN**.		

Table 24: Hide Organization in Directory

Field Name	Description	Notes
Hide Organization in Directory	Checkbox. When checked, your organization is not shown in the business directory.	

C.3 Invoices

Basware Network verifies that the invoice content against local and international regulations in some countries. You can send the invoice only if the invoice content passes this verification.

Basware does not, however, guarantee the legality of invoices sent through Basware Network. It is the invoice sender's responsibility to ensure that the invoice complies with relevant legislation.

Different buyers may require a different number of fields on their invoices. If your buyer does not require all of the fields described below, some of the fields may be hidden from the Invoice view. Some buyers may also require that you fill in custom fields not listed here.

Similarly, some buyers may enforce various validation rules on certain invoices fields. They may, for example, limit you from setting the invoice date too many days in the past, or place limitations on how many characters you may enter in certain fields.

Table 25: Invoice Header

Field Name	Description	Notes
Invoice Date	The date on which the invoice was issued	*06/15/2015*
Due Date	The date on which the invoice must be paid	*07/15/2015*
Invoice Number	A unique identification number of the invoice	Invoice number can contain letters, numbers, and special characters.
Payment Reference	Reference number of the payment	

Field Name	Description	Notes
eInvoicing Address	The recipient's e-invoicing address	The recipient's e-invoicing address is a unique identifier that Basware Network uses to identify the correct recipient. This field will show only after you have selected a recipient. If the service has filled in this field automatically, do not edit the value.
Sales Tax Number	Your organization's sales tax number	*1234567890*
Supplier's Reference Number	Reference number of the invoice that the supplier provides	*1138*
Purchase Order Number	Number of the purchase order that this invoice is based on	*5553226*
Delivery Date	Date on which the invoiced goods will be delivered	*06/17/2015*
Supplier's Contact Person	Contact person on the supplier's side that the customer can contact	*John Q. Contact*
Recipient's Contact Person	Contact person on the recipient's side that the supplier can contact	*Jane Q. Contact*
Recipient's Email Address	Email address of the company that receives this invoice	*Acme Buyers Inc.*
Contract Number	Number of the contract between the supplier and the customer	*80085*
Buyer Reference	Indentification number that the customer has provided	*715517*
Payment Terms	Conditions related to the payment of the ordered goods	*Net 30*
Currency	Dropdown list. Lets you select the currency used on the invoice	*USD*
Exchange Rate	If the currency code is different from the sender's local currency (For example, if a supplier from the United Kingdom issues an invoice in EUR), the exchange rate field is shown. In this case, it is mandatory field that the sender must fill in. When a value is filled in, Basware Network will auto-calculate all sales tax amounts in the local currency, too.	*1.23*

Field Name	Description	Notes
Comment	The supplier can add a message to the buyer in this field	
Shipment Number	Identification number of the shipment	*BG123321123321*
Payment Penalty Rate	Rate at which the customer will be charged if the invoice is not paid in time	*10% per annum*
Tax Information	Text field that can be used to provide details about sales taxes related to this invoice	
Advance Payment Terms	Conditions related to the advance payment of the ordered goods	*1% 10 Net 30*
Freight	The charge for transporting the ordered goods	*$22.50*
Handling Fee	The cost of packaging and mailing an order	*$12.50*

Table 26: Invoice Line Items

Field Name	Description	Notes
Name	Name of the invoiced item	*Widget*
Quantity	Quantity defines the number of items that have been invoiced	*20*
Unit Price	Unit price defines how much one invoiced item costs	*$4.99*
Net Total	Total price of the invoiced items before tax	*$98.30*
Line Type	Line type Line types that are visible on an invoice depend on the capabilities of the recipient you have selected.	*Material*
Purchase Order Number	Number of the purchase order that this invoice line is related to	*5553226*
Order Line ID	The identification number of the order line on which this item was ordered	*LN1*
Product Code	Product code of the invoiced item	*235765676*
Unit of Measure	Unit of measure defines the units in which the invoiced items are measured	*Bundle*
Sales Tax %	Sales tax percentage of this item	*6.68%*
Description	Description of the invoiced item	*Green Acme Brand Widget*
Discount %	Discount percentage of this item	*1.5%*
Discount Amount	The amount of discount in the selected currency. Updated automatically based on the quantity, unit price and discount %.	*1.5*

The main line types on an invoice are **Material** and **Service** lines, which are divided into subtypes according to the type of goods.The available line types are:

- Material
  - Material invoiced by quantity (Contractual)

- Material invoiced by amount
- Service
  - Service invoiced by quantity
  - Service invoiced by quantity (Contractual)
  - Service invoiced by amount
- Unplanned budget

Table 27: Language-based decimal separators

Language	Decimal separator
Arabic	. (dot)
Czech	, (comma)
Danish	, (comma)
Dutch (all variants)	, (comma)
English (all variants)	. (dot)
Finnish	, (comma)
French (all variants)	, (comma)
German	, (comma)
Greek	, (comma)
Hungarian	, (comma)
Italian	, (comma)
Norwegian	, (comma)
Polish	, (comma)
Portuguese	, (comma)
Spanish	, (comma)
Swedish	, (comma)