

1 Getting Started

Like Basware Supplier Portal, our new portal is an online tool. This means that you only need a modern web browser to be able to use the new portal.

If you have previously used Basware Supplier Portal user, you can use the new portal with the same user credentials you used with Basware Supplier Portal.

1.1 Open and close the application



1. Open your web browser.
2. Open the **Login** page:
<https://portal.basware.com>
3. Enter your username and password in the the **Email/Username** and **Password** fields.
4. Click **Log In** to login to the service.



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

When you're finished, click **[Your Username] > Log Out** in the top-right corner of the page to log out.



2 Managing your information

2.1 View and edit your account information

You can view and edit your user account information on the **My Account** page. For information on how to change your password, see [Change your password](#).



1. On the top-right corner, click **[Your Username] > My Account**.
The **My Account** page opens.
2. Click **Edit** to edit your user information.

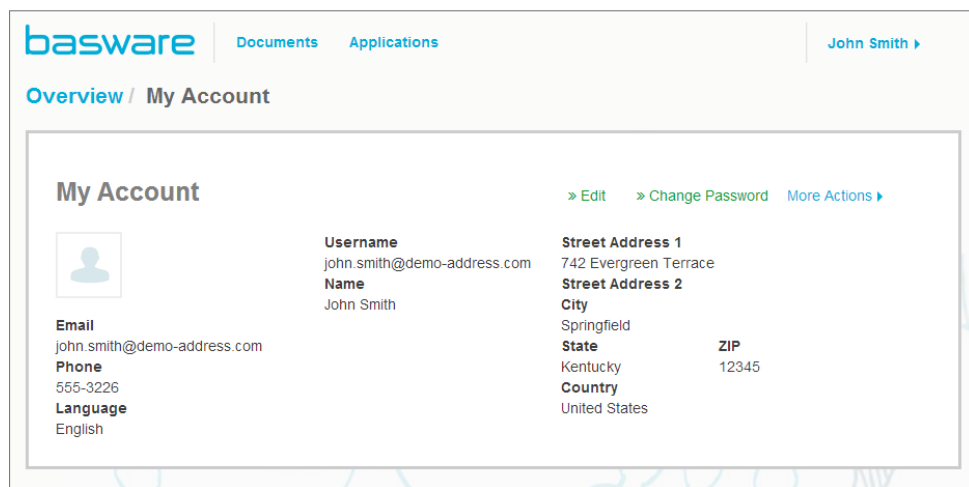


Figure 1: My Account view

3. Make the necessary changes to your user information.



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

For descriptions of the fields on this page, see [My Account](#).

4. Click **Save Changes** to save the changes you made to your user information, or click **Cancel** to discard them.

2.2 Change your password

You can 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 **Change password**.

3. Enter your current password in the **Current password** field.
4. Enter your new password in the **New password** and the **Confirm password** field.
5. Click **Save Changes** to save your new password.

2.3 Reset your password

In case you forget your password to Basware.com, you can reset your password on the Login page.



1. Open the **Login** page:
<https://portal.basware.com>
2. On the **Login** page, click **Forgot your password?**
3. Enter your email address in the **Username** field.
4. Click **Submit**.
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 on the link to open it in your default web browser.
The **Choose New Password** page opens.
6. Enter your new password in the **New password** and the **Confirm password** fields.
7. Click **Save** to save your new password.

2.4 View and edit your organization's information

You can view and edit your organization's information on the **My Organization** page.




1. On the top-right corner, click **[Your Username] > My Organization**.
The **My Organization** view opens and shows your organization's current information.



basware Documents Applications John Smith

Overview / My Organization

Organization > Edit More Actions >

<p>Name Mid-Century Modern</p> <p>Business Number 99988890</p> <p>Organization No. 9998889-0</p> <p>Website</p>	<p>Company Logo</p> 
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<p>Street Address 1 Main Street</p> <p>Street Address 2</p> <p>City Springfield</p> <p>Country United States</p>	<p>State KENTUCKY</p> <p>ZIP code 12345</p>	<p>Contact Name John Smith</p> <p>Phone</p> <p>Fax</p> <p>Email john.smith@demo-address.com</p>
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Electronic Invoicing Address
003799988890

Capability
Invoice: SEND, RECEIVE
Purchase Order: RECEIVE, SEND

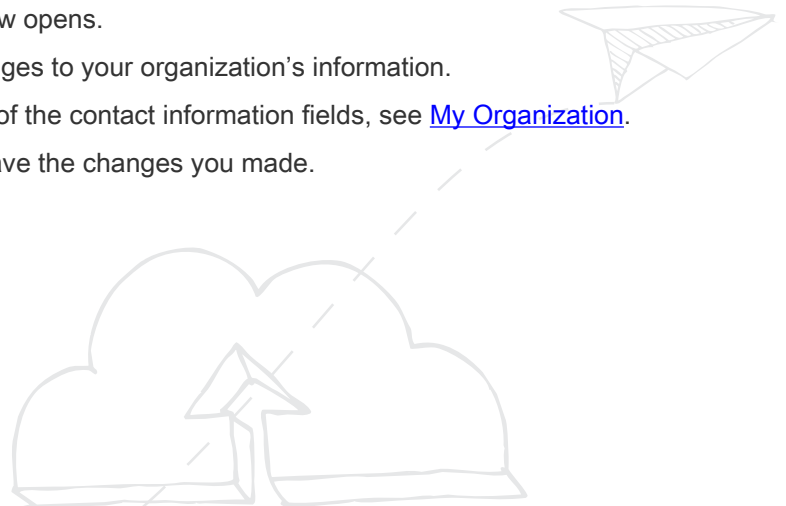
Do not publish in Directory
No

Banking Details

Account No.:	123456-654321
SWIFT/BIC:	NDEAHFF
IBAN:	FI08123456654321
Name	Madeup Bank

Figure 2: My Organization view

2. Click **Edit**.
The **Edit Organization** view opens.
3. Make the necessary changes to your organization's information.
For detailed descriptions of the contact information fields, see [My Organization](#).
4. Click **Save Changes** to save the changes you made.



3 Managing Business Documents

You can manage your organization’s business documents on the **Documents** page. The page is divided into several tabs that help you find the documents that you need faster.

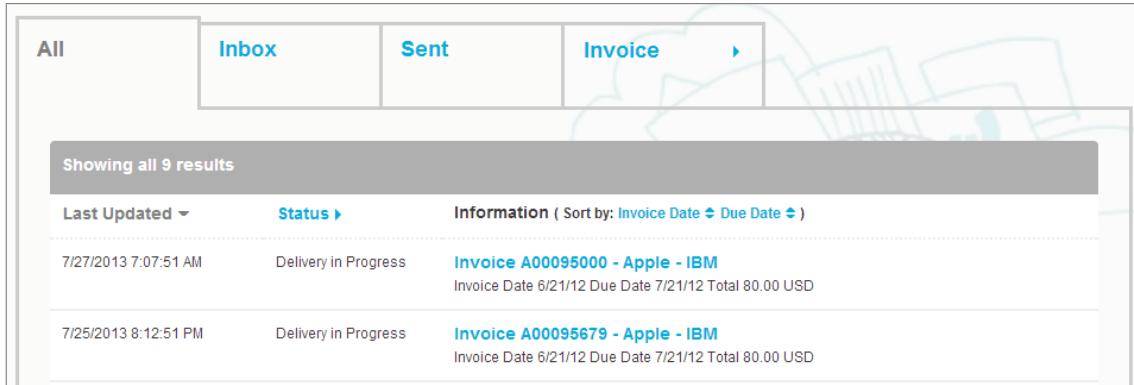


Figure 3: Documents page

- All tab** The **All** tab shows all the business documents that your organization has either sent or received.
- Inbox tab** The **Inbox** tab shows all business documents that your organization has received.
- Sent tab** The **Sent** tab shows all 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.
- Document tab** The **Document** tab shows all business documents of a certain type that your organization has both sent and received. Select the type of document to be shown in this tab by clicking on the label of the tab and selecting the document type from the drop-down list.

3.1 Search for business documents

When you log in to [the service](#), the application shows you a list of all business documents that your organization has received, and that you have sent to your business partners. If you are looking for a specific business document, you can use search to limit the results.



By default, the **All** tab shows you documents sent and received in the last 30 days. To see all your documents, close the Date Range pane at the top of the **Search Results** table.



1. Enter the document number in the **Search** field.
2. Click **Search**.

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

Showing all 13 results		
Last Updated	Status	Information (Sort by: Invoice Date Due Date)
7/24/2013 10:26:09 AM	Approved by Recipient	Invoice A00095671test - Consortial - IYT Corporation Invoice Date 7/24/13 Due Date 7/21/12 Total 90 USD
7/24/2013 10:25:12 AM	Approved by Recipient	Invoice discussiontest - Consortial - IYT Corporation Invoice Date 7/24/13 Due Date 7/21/12 Total 90 USD

Figure 4: Search Results table

For information on how to refine your search, see [Search for business documents using advanced search](#).

- To sort the list of results, click on the **Sort** labels:



Figure 5: Sort by labels

- To view a business document, click on the business document title in the **Search Results** table.

3.2 Search for business documents using advanced search



By default, the application shows the documents of the last 30 days. To see all documents, close the date range pane at the top of the **Search Results** table.



- Enter a business document number in the **Search** field.
- To filter search results by business document details, add the filters you want to use:
 - Click to open the **Advanced Search** panel.

Figure 6: Advanced Search panel

b. Enter the filters that you want to use:

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

3. Click **Search**.

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

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

(Sort by: Invoice Date ▾ Due Date ⇅)

Figure 7: Sort by labels

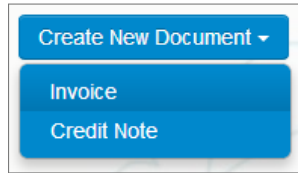
- **Invoice Date:** Sort the results based on invoice dates.
- **Due Date:** Sort the results based on due dates of the business documents.

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

3.3 Create an invoice



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



Basware.com 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**.

The **Select Sender** view opens.

- b. Click ☆ next to the name of an organization to set that organization as your favorite.

Your favorite organization is marked with the ☆ icon.

- c. Click the name of the organization to select it as the sender.

3. Select a recipient.

- a. Enter the name of the recipient in the **Name** field and press Enter.

The **Recipients** list opens and shows the recipients that match your query.

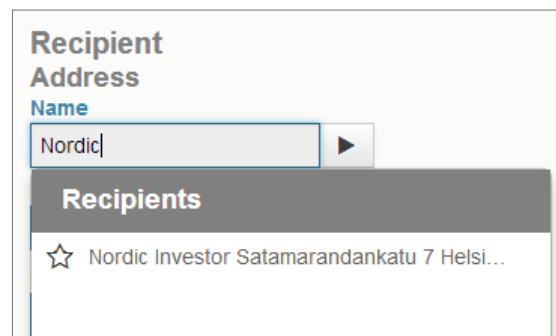


Figure 8: Recipients list

- b. On the **Recipients** list, click on the name of an organization to select it as the recipient.

4. Enter the invoice details.

The service validates the contents of the fields and notifies you if the content of the 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.

Line ID	Product Code	Order Line ID	Name	Quantity	Unit of Measure	Unit Price	Sales Tax %	Sales Tax	Net Total	Description
1	1138	1	Football	11	Piece	22.00	12.00	29.04	242.00	2014 Edition

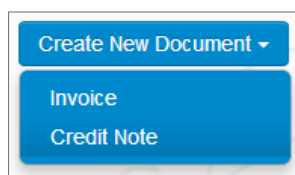
Figure 9: Invoice lines

- b. Enter the details of the line item.
 - 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.
7. Click **Send Invoice** to send the invoice to your customer.

3.4 Create a credit note



1. Click **Create New Document > Credit Note** in the **Documents** view.



The service opens the **Edit Credit Note** view and creates a draft credit note.

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**.

The **Select Sender** view opens.
 - b. Click ☆ next to the name of an organization to set that organization as your favorite.

Your favorite organization is marked with the ★ icon.
 - c. Click the name of the organization to select it as the sender.
3. Select a recipient.
 - a. Enter the name of the recipient in the **Name** field and press Enter.

The **Recipients** list opens and shows the recipients that match your query.

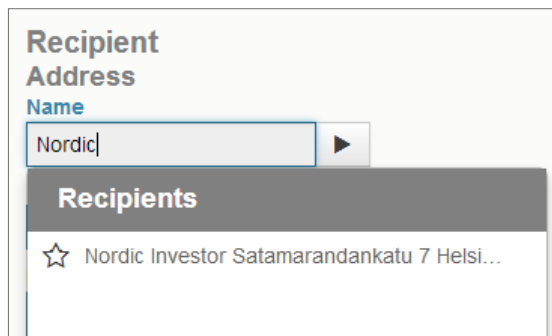


Figure 10: Recipients list

- b. On the **Recipients** list, click on the name of an organization to select it as the recipient.
4. Enter the credit note details.
 The service validates the contents of the fields and notifies you if the content of the field does not pass validation. For descriptions of the fields, see [Invoices](#).



Make sure that you have entered the number of the invoice connected to the credit note in field **Invoice Reference**.

5. Enter the details of the products or services that you want to reimburse.
 - a. On the **Line Data** tab, click **Add Line** to add a new line.

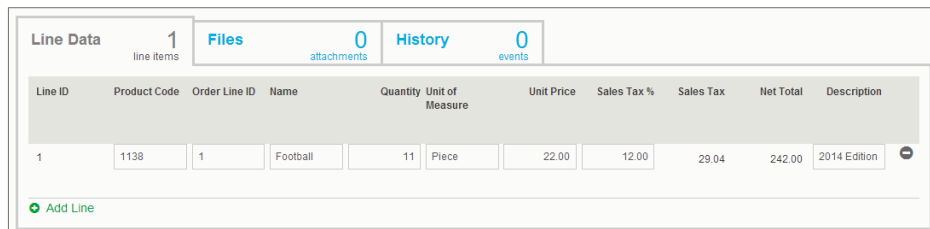


Figure 11: Credit note lines

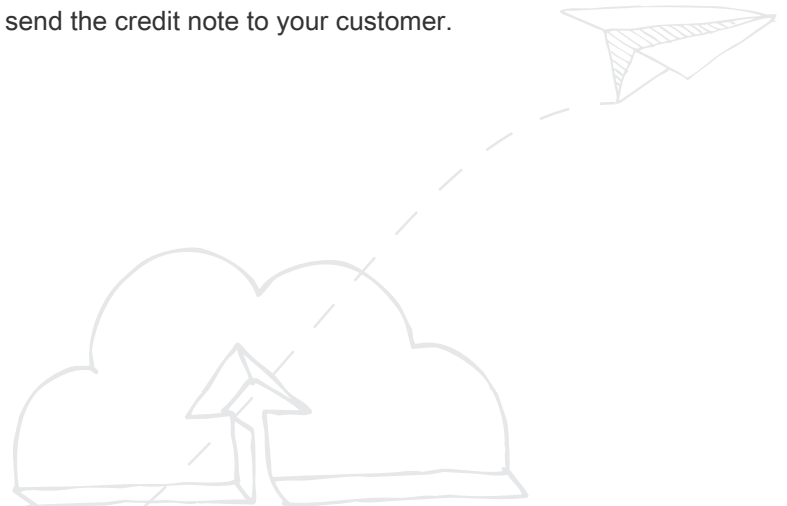
- b. Enter the details of the line item.
 - c. Click **Add Line** to add another line item, if necessary.
6. Add attachments to the credit note.
 If you need to add attachments to the credit note, you can add them through the **Files** tab.
 - a. Click **Files** to open the **Files** tab.
 - b. Click 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.

3.5 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.
5. Make sure that the **Invoice Reference** field contains the number of the invoice this credit note refers to.
6. Edit the **Line Data** information so that the lines contain the products/services that you want to reimburse.
7. 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.
8. Click **Send Credit Note** to send the credit note to your customer.



4 Sending Messages

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.

Each business document in the service has 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.

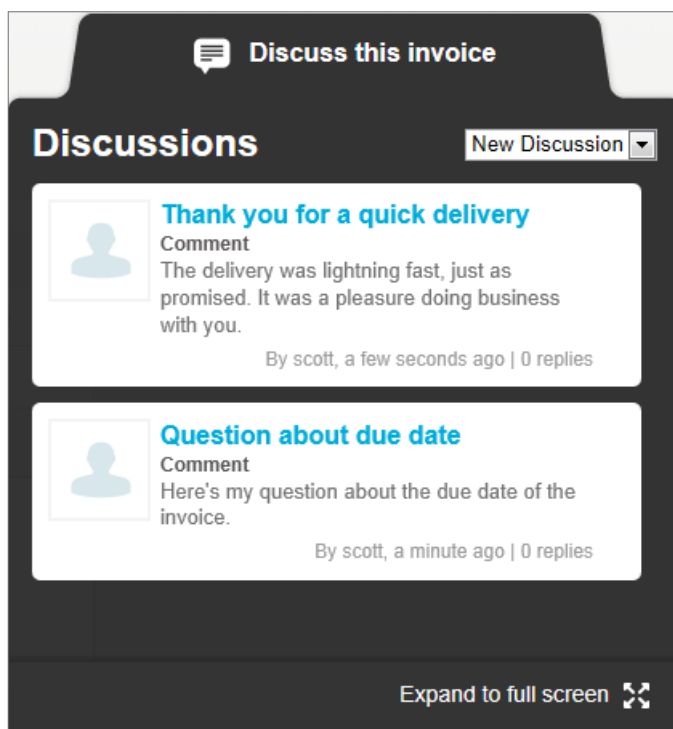


Figure 12: Discussion panel

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.

4.1 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.

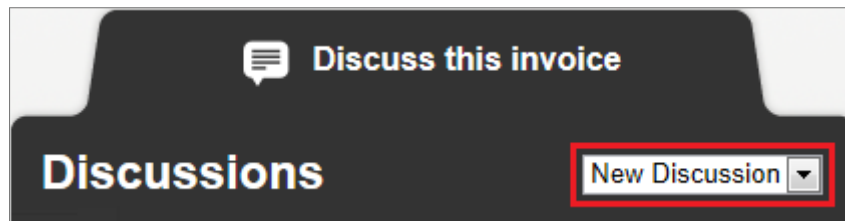


Figure 13: New Discussion drop-down list

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.

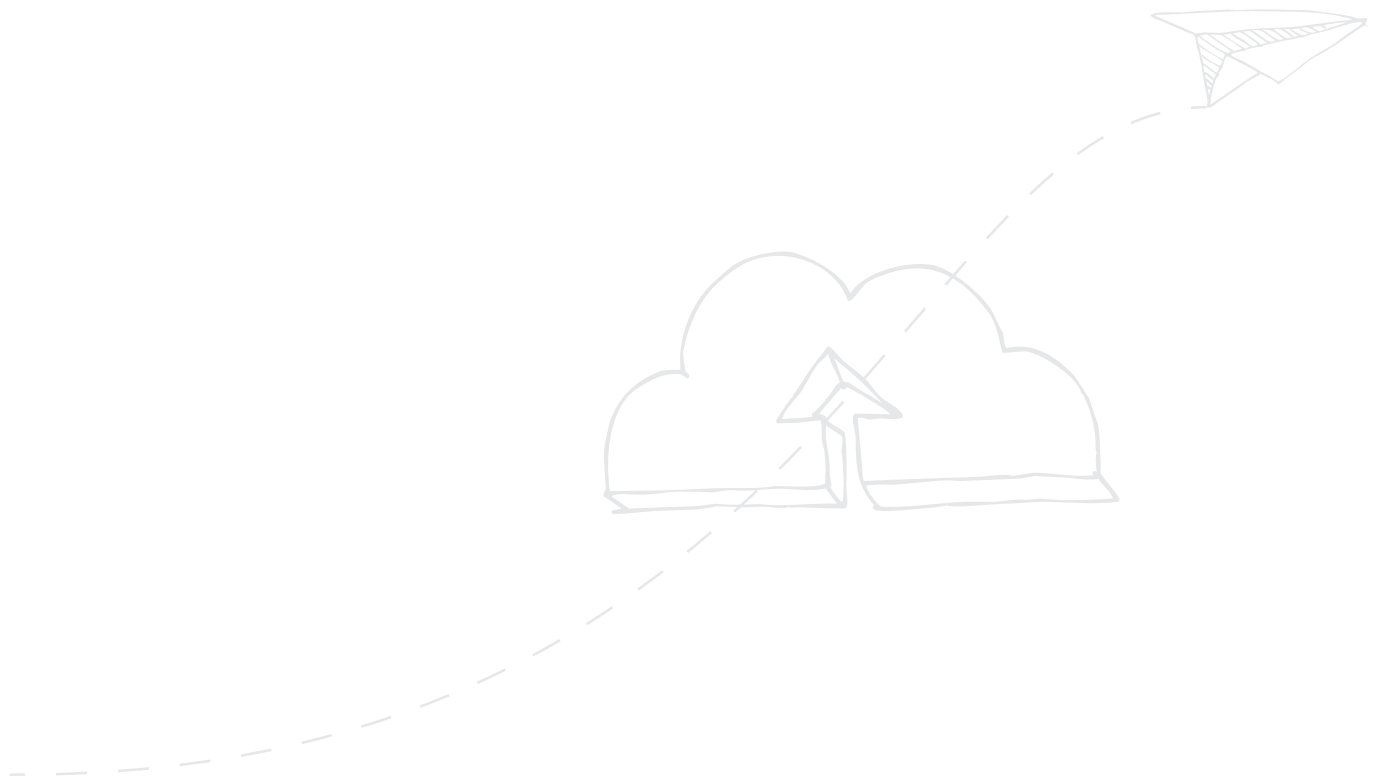
The service notifies your business partner about your message. Once they reply to your message, the service sends you a notification.



5 Contact Information

If you cannot find the information you are looking for in this document, please contact the Basware Global Service Desk. The Service Desk 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 Basware Global Service Desk, visit our website http://www.basware.com/Contact_Us/Pages/Support.aspx.



Appendix

A

Field Names and Descriptions

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

- [My Account](#)
- [My Organization](#)
- [Invoices](#)

A.1 My Account

Table 1: My Account Fields


Field Name	Description	Notes
Username	Username of the current user.	Username is the email address that you used when you registered to Basware Portal. Username cannot be modified.  If you have to reset your password, Basware.com will send the reset link to this address.
Name	Name of the current user.	Displayed only on the My Account page.
First Name	First name of the current user.	Displayed only on the page.
Last Name	Last name of the current user.	Displayed only on the page.
Email	Email address of the current user.	Email address to which Basware Portal delivers notifications related to the service.
Phone	Phone number of the current user.	
Street Address 1	Street address of the current user.	
Street Address 2	Additional street address of the current user.	

Table 1: My Account Fields (continued)

Field Name	Description	Notes
City	Hometown of the current user.	
ZIP	Zip code of the current user.	
Country	Homeland of the current user.	

A.2 My Organization

Table 2: General Information

Field Name	Description	Notes
Name	Name of the current organization	
Sales Tax Number	Sales tax number of the current organization.	
Organization No.	Organization number of the current organization	
Website	Address of the current organization's website	For example, www.example.com
Organization's Logo	Logo of the current organization.	Supported logo formats are GIF, JPEG, and PNG.

Table 3: Contact Information

Field Name	Description	Notes
Street Address 1	Street address of the current organization.	
Street Address 2	Additional street address of the current organization.	
City		
Country		
State		
ZIP		
Contact Name		
Phone		
Fax		
Email		

Table 4: Electronic Invoicing Details

Field Name	Description	Notes
Electronic Invoicing Address		

Table 5: Notification Details

Field Name	Description	Notes
	Checkbox that defines whether the organization wants to receive notifications, when a customer sends a new purchase order.	
Email	Email address to which Basware Portal sends the notification.	
Language	Language of the notification.	

Table 6: Banking Details

Field Name	Description	Notes
Account No.	Bank account number	
SWIFT/BIC	Identification code of the bank in SWIFT/BIC format	
IBAN	Bank account number in the International Bank Account Number format	
Name	Name of the bank account	Custom name of the bank account

A.3 Invoices



Basware.com verifies that the invoice content against local and international regulations. You can send the invoice only if the invoice content is valid.

Table 7: Invoice Fields

Field Name	Description	Notes
Invoice Date	Date of the invoice.	Can be set a maximum of 35 days in the past. For example, if the current date is July 6th, the earliest date you can select is June 1st.

Table 7: Invoice Fields (continued)

Field Name	Description	Notes
Due Date	The date on which the invoice must be paid.	
Invoice Number	A unique identification number of the invoice	Invoice number can contain letters, numbers, and special characters. The maximum length of the invoice number is 16 characters.
Recipient's eInvoicing Address		
Sales Tax Number	Your organization's sales tax number	
Supplier's Reference Number		
Order Reference		
Freight	The charge for transporting the ordered goods	
Supplier's Contact Person		
Recipient's Contact Person		
Payment Terms	Conditions related to the payment of the ordered goods	
Currency	Currency used on the invoice	
Comment		
Handling Fee	The cost of packaging and mailing an order	

