

How to use Matching

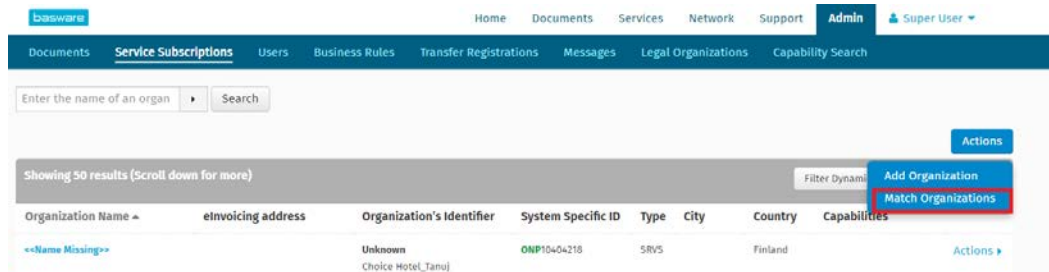
Matching is a **mass search** that compares a collection of organization data against the data in Basware Network. You must be logged in as a super user to use Matching.

1. Create a csv file that contains the following information about the customer organization(s) you want to match:
 - name
 - country
 - party ID

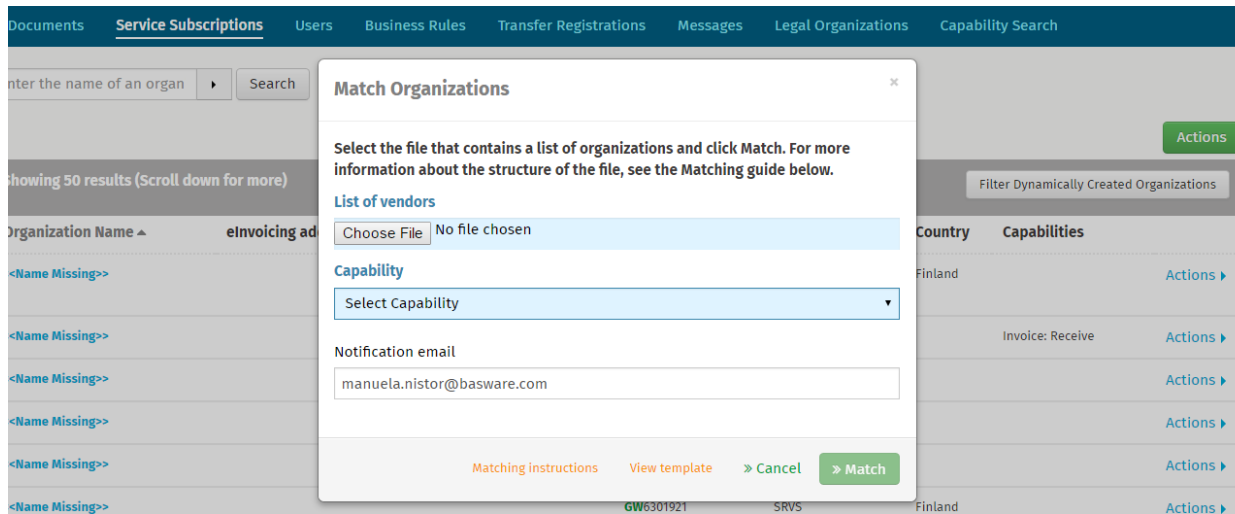
File structure example:

name	country	partyId1	partyId2	volumes
------	---------	----------	----------	---------

2. Log in as a super user, and navigate to the **Admin** menu. Click **Service Subscriptions**.
3. Click **Actions**, and select **Match Organizations**.



4. Upload the csv file that contains the relevant customer organization information, and select a capability that will be used in the search.



5. You can add or change the email address where notifications about the matching process are sent. The system will use the email address associated with your user profile by default.

Click **View template** to see the template used in the search, and click **Matching instructions** if you want to see detailed instructions.

6. Click **Match**.

When the matching is completed, you will receive an email with the results of the matching. You can also view the result in Basware Portal. If you want to see all cases that are processed during the matching, navigate to **Admin > Capability Search**.

Matching result file

Example of a result file:

name	country	partyId1	partyId2	volumes	result	info
Arodo BVBA	BE	BE012345922			TRACE	"LO -> id: UNKNOWN ARODO BVBA -> id: 13212345 country: BE capabilities: services: provider: Basware Scan Service emails: reason: CAPABILITY MISMATCH
Houseboats and Barge	GB	GB20123456			NOT MATCHED	
Vanderlande Industri	GB	GB12345678			TRACE	"LO -> id: UNKNOWN VANDERLANDE INDUSTRIES -> id: 4456780 country: GB capabilities: services: provider: Basware Scan Service emails: reason: NAME MATCH ONLY
Vanderlande Industri	IT	IT012345671			NOT MATCHED	VANDERLANDE INDUSTRIES B.V. -> id: 1234567 country: GB capabilities: services: provider: Basware Scan Service emails: reason: NAME MATCH ONLY
Esso Nederland B.V.	NL	NL001027311B01			MATCHED	LO -> id: 12667 Esso Nederland B.V. (0530) -> id: 123456789 country: NL capabilities: RECEIVE_INVOICE RECEIVE_INVOICE_SEND_ORDER services: E-orders and E-invoice Receiving provider: Basware E-invoice Operator emails: noreply@email.com

Descriptions of the **Result** column values:

Value	Description
ERROR	Information is missing from one of the mandatory columns.
NOT MATCHED	A matching company is not found in Basware Network based on the combination of the country and party ID1.
MATCHED	A matching company is found in Basware Network based on the combination of the country and party ID1.
TRACE	A company that nearly matches your data is found. The search capability may be different, the match may be based only on the company name.

Descriptions of the **Info** column values:

Value	Description
ERROR	Error message: "The columns 'name' 'country' and 'partyId1' cannot be empty"
MATCHED	<ul style="list-style-type: none"> • the ID of the matched organization • the name of the service subscription that was matched • id of the service subscription • country • capability • services that are enabled for that service subscription

	<ul style="list-style-type: none"> • the provider • the contact emails that are available for that service subscription
TRACE	<p>The reason why the match was not perfect.</p> <ul style="list-style-type: none"> • Capability mismatch <ul style="list-style-type: none"> ○ the service subscription is found based on the country / party ID1 combination, but the search capability is different. • Name match only <ul style="list-style-type: none"> ○ the matching for country / party ID1 combination failed, but there is a service subscription with the same name is found.