basware

Simplify Operations, Spend Smarter.

USER GUIDE
Basware Network (June 2022)

About Basware Network support documentation

The following documentation is available for Basware Network users:

- [Online help](#)
- This user guide

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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 in the **Username** field, and click **Next**.
4. Enter your password in the **Password** field.

    If you have forgotten your password, you can reset your password on the login page.
5. Click **Log in**.
6. If you have enabled 2-step verification, you are asked to enter the verification code that you received on your phone. Type the code, and click **Log in**.

    For instructions on how to enable 2-step verification, see Set up 2-step verification.

> You are automatically logged out of the service after five minutes of inactivity.

1.2 Close the application

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

> You are 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 functionalities and benefits of Basware Network. You can also view your current tasks and transactions in the **Dashboard** view. 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 the **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
- Reset your password
- Set up 2-step verification
- 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 its 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

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

   The **My Account** page opens.

2. Click **Edit** to edit your user information.

Overview / My Account

My Account   » Edit   » Enable 2-step verification   » Change Password   More Actions ▸

Email   Username   Country
john.smith@demo-address.com   john.smith@demo-address.com   United States
Phone   Name
555-3226   John Smith
Language
English

Login History
Last Successful Login   Last Unsuccessful Login   Number of unsuccessful login attempts since the last
4/28/2020 11:54:59 AM   3/26/2020 1:08:36 PM   successful login
                                                                 1

Figure 2: My Account view

3. Make the necessary changes to your user information.

   ℹ️ 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 Network 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**.

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 upper-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 are asked to change your password every 45 days. If your password has expired, you are 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. Enter your username in the **Username** field, and click **Next**.

> In most cases, your username is the email address that you used when you registered to the service.

3. Click **Forgot your password?**.

4. Click **Send Request**.

   The service sends you an email with a link to a 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 Set up 2-step verification

Use your mobile phone to add an extra layer of security to your user account. You will use a unique code that you receive on your phone every time you log in.

You can choose how you want to receive the code on your phone:

- Text message
- Authenticator application such as Google Authenticator. To use this method, you must install the application on your phone.

Follow these steps to set up 2-step verification:

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

   The **My Account** page opens.

2. Click **Enable 2-step verification**.

3. Do one of the following:
   - To receive your verification codes in text messages, next to **Text messages**, click **Enable**.
   - To receive your code using an authenticator application, next to **Authenticator app**, click **Enable**.

Set up 2-step verification

Select the way you want to receive 2-step verification codes.

Text messages | Inactive   [Enable]
Receive verification codes as text messages.

Authenticator app | Inactive   [Enable]
Use an authenticator application to generate verification codes.

[Continue]

© 2019 Basware
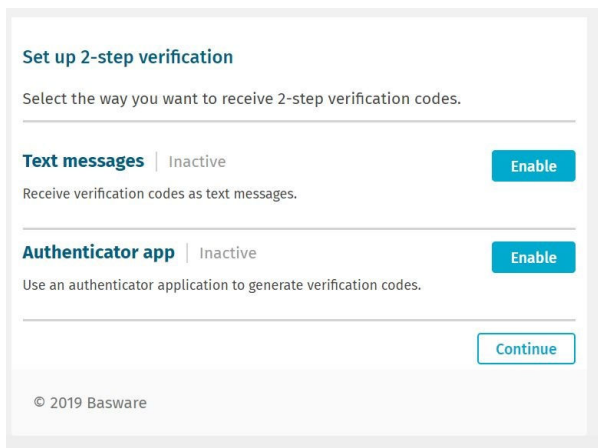
Figure 3: View for selecting how to receive the verification code

4. Follow the instructions on the screen.

3.5 Upload a profile picture

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

   The **My Account** page opens.

2. Click **Edit**.

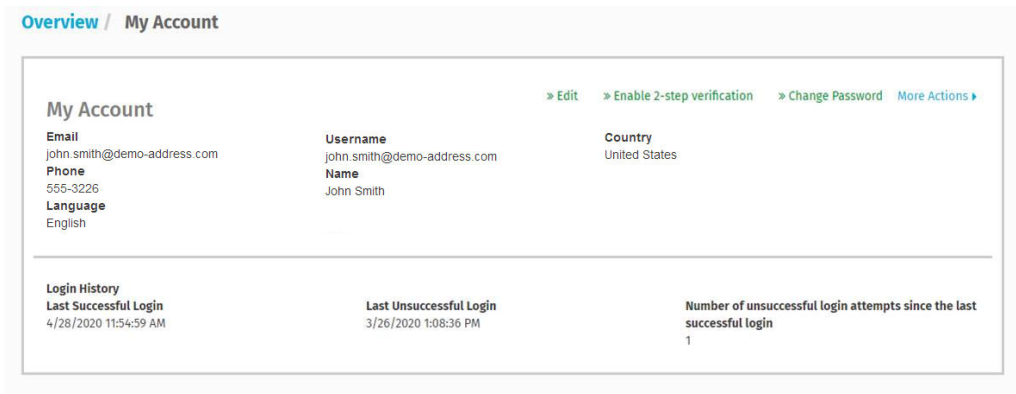3. Click **Upload**, and select a profile picture.

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

   Once the picture has been successfully uploaded, it is displayed on the **My Account** page.

4. Click **Save Changes**.

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

> If your company is made up of a single organization, you are taken directly to the **My Organization** page without you having to click the name of an organization.
>
> If your company is made up of multiple organizations, each child organization is displayed on this page in alphabetical order.

3. Click **Edit**.
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 identifier in the **Organization Identifier** field. Without a valid identifier, organizations in the EU cannot send invoices.

For detailed descriptions of the fields, see [My Organization](#).

5. Click **Save Changes**.

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 upper-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 that 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 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 **Organization Name**.

    The arrow icon next to the label shows you whether the results are sorted in ascending or descending order. To reverse the order, click 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 upper-right corner, click **[Your Username]** > **My Organization**.

2. Click the name of the organization whose users you want to view.

    > If your company is made up of a single organization, you are taken directly to the **My Organization** page without you having to click the name of an organization.
    >
    > If your company is made up of multiple organizations, each child organization is 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 the 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 a user's information, click their username in the **Search Results** table.

4.4 Add a user to your organization

Company administrator users can add users to their 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 upper-right corner, click **[Your Username]** > **My Organization**.

2. Click the name of the organization that you want to add a new user to.

   > If your company is made up of a single organization, you are taken directly to the **My Organization** page without you having to click the name of an organization.
   >
   > If your company is made up of multiple organizations, each child organization is 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 to 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**.

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 have activated their account and set a strong password.

4.5 Manage your company's bank accounts

On the **My Organization** page, 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

Add a bank account

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

   The **My Organization** page opens.

2. Click **Edit**.

3. Under **Banking Details**, click **Add Bank Account**.

   The system 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**.

Edit a bank account

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

   The **My Organization** page opens.

2. Click **Edit**.

3. Click the bank account field(s) that you want to change, and edit the contents of the field.

4. Click **Save Changes**.

Remove a bank account

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

   The **My Organization** page opens.

2. Click **Edit**.

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**.

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 is added to it by default.

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

   The **My Organization** page opens.

2. Click **Edit**.

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**.

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 is shown, for example, on all business documents that your company sends through Basware Network.

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

   The **My Organization** page opens.

2. Click **Edit**.

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

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

   Once the image has been successfully uploaded, it is displayed under the **Organization Logo** label.

4. Click **Save Changes**.

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 field at the top of the page to find documents, and the page is divided into several tabs to help you browse your documents with ease.
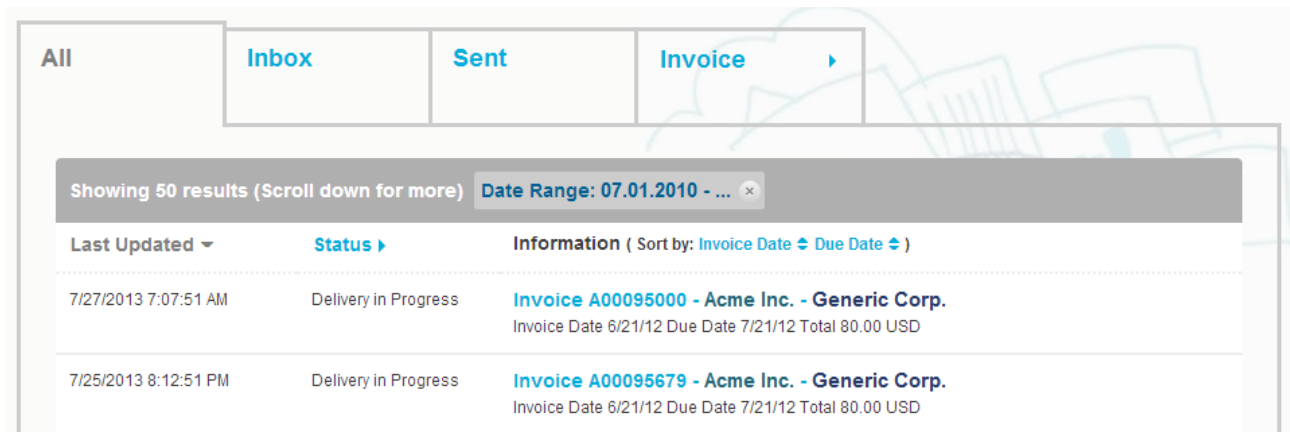
Figure 4: Documents page

The tabs contain the following business documents:

All	Shows all the business documents that your organization has either sent or received.
Inbox	Shows all the business documents that your organization has received.
Sent	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 have not sent yet.
Ready for Delivery	Business documents that you have sent, but that have not yet been forwarded to delivery.
Delivery in Progress	Business documents that are currently being delivered to the recipient.
Delivered to Recipient	Business documents that have been delivered to the intended recipient.
Received	Business documents that the recipient has opened.
Rejected during Delivery	Business documents that have been rejected during the delivery process. Usually, this means that Basware Network has forwarded your document to your business partner's e-invoicing operator, but their system has rejected the document. If your document gets rejected, make sure that the contents of the document are valid, and try sending the document again. If the problem persists, contact Basware Support.
Delivery Delayed	Business documents that Basware Network could not deliver to the intended recipient. 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

ℹ️ If the company that has sent you a business document requires 2-step verification for additional security, you must set up 2-step verification to be able the view the document. Follow the instructions that are shown when you try to open the document, or see Set up 2-step verification.

5.3.1 Find a document

When you log in to Basware Network, you 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 in to Basware Network, by default, you can see the business documents that you have 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 5: Search Results table

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

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

Figure 6: Sort by labels

5. To view a business document, click the title of the business document in the **Search Results** table. 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 have received from your business partner.

5.3.2 Find a document using advanced search

When you log in to Basware Network, by default, you can see the business documents that you have 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 the search results by document details, add the filters that you want to use:

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

   Figure 7: Advanced Search panel

   b) Enter the filters that you want to use:
   - **Sender**: Show documents from a specific sender.
   - **Recipient**: Show documents that have been 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 the **Sort** labels:

(Sort by: Invoice Date ▾ Due Date ⇕)

Figure 8: Sort by labels

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

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

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

> **i** The service notifies you, typically within 7 to 14 days, if you have forgotten to open an invoice that you have 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

Sender / Remittance address	Invoice Details	
	Invoice Date	**Due Date**
	10/09/2020	10/31/2020
Puoti Oy	**Invoice Number**	
Service Subscription	108203	
Service Provider Service Agreement	**Payment Reference**	**Payment Reference Message**
Helsinki	**Supplier's Reference Number**	**Purchase Order Number**
Helsinki 00910		B039119077
Finland	**Delivery Date**	**Supplier's Contact Person**
	10/09/2020	Sari H
Tax Registration Country and ID	**Recipient's Contact Person**	**Recipient's Email Address**
Finland	**Contract Number**	**Reference**
VAT FI088	**Payment Terms**	**Currency**
	21vrk	EUR
	Comment	**Exchange Rate**
Recipient	**Shipment Number**	**Payment Penalty Rate**
Hau Oy	**Tax Information**	**Advance Payment Terms**
Service Subscription		
Service Provider Service Agreement		
Finland		
eInvoicing Address		
(Unnamed eInvoicing address)		
0037020		

Figure 9: Header section

The header section contains the basic details of a business document and information about the sender and recipient of the document. This section contains, for example, the following information:

- **Sender**: Contact information of the organization that has sent the business document
- **Recipient**: Contact information of the organization that is the recipient 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 recipient

Additional information section
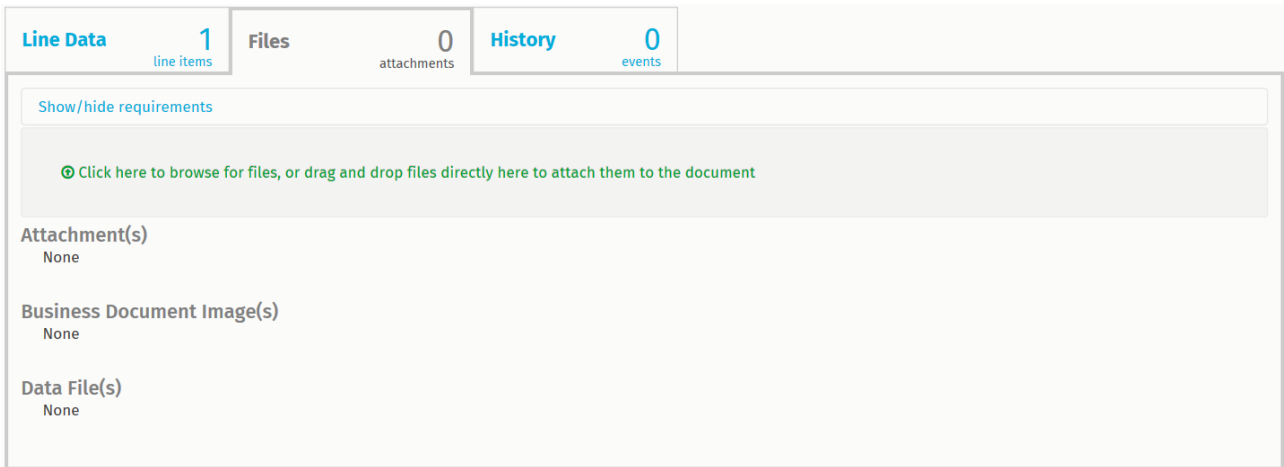
Figure 10: Additional information section

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:

- The **Line Data** tab lists the individual invoice lines on the business document and a summary of the business document.
- The **Files** tab contains all the files — attachments, business document images, and data files — that are attached to the business document.
- The **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 11: 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 that 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 goods or service

Business document	Description	Note
Credit note	An invoice that indicates a credit amount owed by the supplier.	
Purchase order	A business document which specifies needed goods or services and represents an agreement between buyer and supplier.	Typically contains the following header data elements: • Purchase order number • Order date • Recipient • Delivery and invoicing addresses ℹ Basware consultants can set up business rules for invoices that have been created from purchase orders. Business rules 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. If you want to change the sender, do the following:

   a) Under **Sender**, click **Change**.

   b) Find the company that 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 are always displayed at the top of the list.

3. Select a recipient:

   a) Click **Select Recipient**.

   b) Find the company that you want to select as the recipient, and click **Select**.

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

Figure 12: Select Recipient window

ℹ️ If the recipient that you selected has a tax registration number in multiple countries, a list of available tax registration countries opens. Select the tax registration country that 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 are always 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 13: Invoice lines

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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

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ℹ️ The decimal separators used on the line items differ based on the user interface language that you have selected. If you use an incorrect decimal separator, Basware Network may save the number that you enter incorrectly. To find out which decimal separators each language supports, see Table 30: Language-based decimal separators

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ℹ️ 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.

ℹ️ 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 are not saved to the organization's profile.

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

ℹ️ 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. On the **Documents** page, locate the invoice that you want to convert into a credit note.
2. Click the invoice to open the invoice page.
3. Click **Convert To Credit Memo**.

   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.

> ℹ️ Make sure that the **Invoice Reference** field contains the number of the invoice that this credit note refers to.

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5. Edit the **Line Data** information so that the lines contain the products and 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 Memo** to send the credit note to your customer.

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

> ℹ️ 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

> ℹ️ The section describes an optional Basware service. You 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

> ℹ️ The section describes an optional Basware service. You 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 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 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 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. Under **Promised Delivery Date**, set a delivery date:
   - To define a common delivery date for all line items, select the **Specify delivery information at header** radio button, and choose a date under **Promised Delivery Date**.
   - To define a 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 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 a purchase order to open it.

2. Review the purchase order.

3. Click **Reject** to reject the purchase order.

The **Reject Purchase Order** pop-up window opens

4. In the **Comments to buyer** field, add a comment that describes why you have rejected the purchase order.

5. Click **Confirm** to reject the purchase order.

The purchase order is now set to the *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.
   - To disable notifications, clear the **Activate** checkbox.
6. Click **Save**.

6.2 Add a new recipient

You can add new recipients to the invoice emails that are sent by notification services.

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 is 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**.

7 Managing your network

On the **Network** page, you can manage information related to your customers 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 suppliers. You can see, for example, how many of your customers or suppliers can send or receive invoices, how many of them have recently updated their company profile, and which Basware services 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 customer 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.
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 Basware Network.

> [i] The Business Directory tab is visible only to users with Company Administrator credentials.

7.1 Managing suppliers

Basware Supplier Management is a solution that helps you maintain supplier information centrally in Basware Network. The service is designed to work alongside your organization's ERP supplier master database which can be integrated into Supplier Management through an API or a file transfer made through the service's user interface.

You can invite your suppliers to maintain their company information and upload necessary documentation to the service. Customizable data forms help make sure you have compliant supplier registration forms. Once your suppliers have submitted the data form, their details are viewable in Supplier Management. You will also receive an email notification about new submissions or updates to supplier data.

Supplier Management has an external data service provider connection that helps improve the supplier master data. The service is connected to an external company data provider, Dun & Bradstreet, to collect up-to-date supplier information and to enrich your supplier master data. The feature includes automatic data monitoring. You can export the data submitted by your suppliers and the data provided by Basware's data partner at any time.

The service has a supplier creation and approval feature, so that employees from your organization can request new suppliers to be added to your supplier network. With fully configurable approval workflows, you can customize the tool to follow your internal process requirements. Each workflow is linked to a supplier category and can have its own reviewer and approver roles. You can also import suppliers from your ERP solution through the Supplier Management API.

Supplier Management's standardized online workflow reduces your internal workload and improves the audit trail. The service reduces dispute management issues, such as duplicate and inaccurate supplier data in your organization. Using supplier information management services in Basware Network is a natural starting point for suppliers in cloud-based business to exchange data with their customers. Consistent and up to date supplier information ensures better visibility to your supplier base and improves invoice automation and matching processes.

7.1.1 Configuring service settings for Supplier Management

Users with Company Administrator privileges can customize the way Supplier Management works.

Adding suppliers

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

Supplier information templates

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

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

7.1.1.1 Activate supplier approval process

By default, companies can add new suppliers to their network only by sending out invitations to their business partners. By setting up a customizable supplier approval process, you can enable users from your company to suggest new suppliers 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. Select the **I want to approve all the vendors I add to my network** check box to activate the supplier 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 suppliers 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 suppliers to your company by creating a supplier request.
Skip review for vendor requests	Activate this feature if you want to skip the review step for supplier proposals made by users from your company.

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

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

7.1.1.2 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.

7.1.1.3 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.
	Supplier categories drive the approval flow process. Different supplier categories can have different approval flows.
Description	General description of the new approval flow.
Automatically approve vendors	If you select this check box, the supplier is approved automatically when this approval flow is used (that is, when the user creates a supplier

that use this approval flow	proposal using the category that you defined under **Category**). An invitation is sent to the supplier.
	If you do not select this check box, the supplier proposal goes through the normal review and approve process.

6. On the **Steps information** 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 information** 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.

7.1.1.4 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 for the template.

7. Select the **I want to be notified via email about all changes from vendors** check box to receive a notification every time one of your suppliers updates their company information.

8. In the company information sections, select the fields that you want your suppliers to fill in.

    You can define fields as both optional and mandatory depending on your needs.

9. Under **Company Details** or **Documents**, click **Add custom field** to add custom fields to the template.

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    [i] You must define custom fields in the **Service settings** before you can add them on the information request template.

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10. Click **Save** at the bottom of the panel to save the information request template you created, or **Cancel** to cancel the operation.

7.1.1.5 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 🗑

7.1.1.6 Add custom fields

You must define custom fields first before you can add them on information request templates.

1. As a Company Administrator, click **Services**.

2. Under **Vendor Information Management**, click **Vendor Manager**.

3. Click **Custom fields** to expand the section.

4. Click [+] to create a new custom field.

5. In the **Field Name** field, enter a name for the new custom field.

6. In the **Field description** field, enter a description of the new custom field.

7. From the **Type** drop-down list, select what kind of input the supplier should add in the new custom field:

Number input	The supplier can add a number.
Text input	The supplier can write text.
Multiline input	The supplier can write multiple lines of text.
Date input	The supplier can add a date.
Link input	The supplier can add a web link.
Choice option	The supplier can select one of the two options that you define.
Document	The supplier can add a document.
Single-choice selection	The supplier can select one option from the list that you define.

8. Select the **Visible to vendor** check box to make the field visible to your suppliers.

9. Click **Save** to save the new custom field.

7.1.1.7 Configure supplier 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, select the **Notify vendors for expired documents** check box.

5. Define how many days before the expiration date the service sends a notification to the suppliers.

6. To send weekly reminders after the expiration date, select the **Send weekly reminders after the expiry date, until the documents have been updated.** check box.

7. Click **Save** to save the changes.

7.1.1.8 Configure supplier invitations

1. As a Company Administrator, click **Services**.
2. Under **Vendor Information Management**, click **Vendor Manager**.
3. On the **Vendor invitation settings** row, click ✏.
4. If you want the system to send an invitation to the supplier when the reviewer approves the supplier proposal, select the **Enable automatic invitation** check box.
5. If you want to send information to the suppliers by including your own PDF file in each supplier invitation, do the following:
   a) Select the **Upload supplier information kit** check box.
   b) Click **select files**, or drag and drop the PDF file to the gray area.
6. Click **Save** to save the changes.

7.1.2 Adding new suppliers to your network

There are three ways in which new suppliers can be added to your company's network:

- You can import suppliers from your company's ERP solution.
- You can create a campaign to invite new suppliers.
- The service also has a supplier creation and approval feature, with which internal users can request new suppliers to be added to the company's supplier network.

7.1.2.1 Create a campaign to invite new suppliers

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

For detailed instructions, see Goal-driven campaigns.

7.1.2.2 Create a supplier proposal

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

1. Log in to Basware Network.
2. Click **Network**.
3. On the panel on the right, under **Create new vendor request**, click **Create vendor**.
4. On the **New vendor request** page, type the name of the supplier that you want to propose in the search field, and click 🔍.
5. Click **Create new vendor**.
6. Fill in the supplier's details.

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7. Click **Send to review**.

7.1.2.3 Reviewing and approving supplier proposals

If your company has enabled its users to propose new suppliers, you may be required to review and approve supplier proposals.

Each new supplier proposal that you receive appears on the **My Tasks** view on the **Dashboard** page. From there, you can easily review and approve each supplier with just a few clicks.

Review supplier proposals

Each new supplier proposal that you receive appears on the **My Tasks** view on the **Dashboard** page. From there, you can easily review each proposal.

1. Log in to Basware Network.
2. Under **New vendor requests to review**, click **Review requests**.
3. On the list of suppliers shown on the **My Vendors** page, choose the supplier that you want to review, and click **Review**.
4. If you want to edit the information under **Administrative information**, click ✎ and edit the following as necessary:

Category	Change the category of the supplier.
ERP Vendor ID	Edit the supplier identifier that is used in your ERP system.
Eligible for sourcing	Select this check box if you want the supplier data to be copied to your external sourcing system.

   If there are custom fields in the supplier proposal, you can edit them under **Additional information**.

   After you have updated the information, click **Save**.
5. Under **Basic company details**, review the supplier's information.
6. If the supplier data enrichment service by Dun & Bradstreet is activated for your company, you can enrich the supplier data before you approve or reject the supplier. To do this, click **Send to approval** > **Enrich with D&B**.
7. Click **Send to approval** > **Approve** to proceed with the supplier approval process, or **Send to approval** > **Reject** if you want to reject this proposal.

   When you reject a proposal at this stage, the proposal 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.

Approve supplier proposals

Each new supplier proposal that you receive appears on the **My Tasks** view on the **Dashboard** page. From there, you can easily approve each proposal.

1. Log in to Basware Network.
2. Under **Vendors await your approval**, click **Approve vendors**.

3. On the list of suppliers shown on the **My Vendors** page, choose the supplier that you want to approve, and click **Approve**.

4. Go through the supplier's information.

5. Click **Approve** to approve the supplier 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.

7.1.2.4 Import suppliers from your ERP solution

If you want to add new suppliers to your network by importing them from your existing ERP solution, go to https://developer.basware.com/api/api_selection_guide, and see section "Managing suppliers through Basware Supplier Management".

7.1.3 Using supplier data enrichment service by Dun & Bradstreet

The supplier data enrichment service by Dun & Bradstreet is an optional service that checks and enriches your suppliers' data based on the information found in the global Dun & Bradstreet company registry. If the service has been activated for your company, it provides an additional way of making sure that the supplier data is up to date.

7.1.3.1 Enrich supplier data from Dun & Bradstreet

If the Dun & Bradstreet feature has been activated for your company, you can enrich the information of the suppliers with information from the global Dun & Bradstreet registry. The amount of suppliers that you can apply this feature to depends on your company's agreement with Basware.

1. Log in to Basware Network.
2. Click **Network**.
3. Click **Vendors**.
4. On the list of suppliers, do one of the following:
   - To enrich the data of an individual supplier, in the drop-down list next to the supplier, select **Enrich with D&B**.
   - To enrich the data of multiple suppliers, select the check boxes next to the suppliers that you want, and in the drop-down list above the supplier list, select **Enrich with D&B**.

The selected suppliers are sent to the Dun&Bradstreet data enrichment service. On the list of suppliers, the D&B status changes to **In progress**. When the supplier data has been checked by the service, you receive an email notification, and the D&B status changes according to the received results.

After this first data enrichment check, the service keeps monitoring the Dun&Bradstreet registry and updates the supplier data automatically if changes occur.

7.1.3.2 View enriched supplier data

For the suppliers for which you are using the supplier data enrichment service by Dun & Bradstreet, you can view the company information that has been enriched with data retrieved from the global Dun & Bradstreet registry.

1. Log in to Basware Network.
2. Click **Network**.
3. Click **Vendors**.
4. In the drop-down list next to the supplier that you want to view, select **Company Details**.
5. Click **Master data enriched with Dun & Bradstreet information** to expand the section.

   The enriched supplier data is shown.

7.1.4 Managing existing suppliers

You can view your suppliers' information, for example, to quickly check the services that they are using.

7.1.4.1 Find and view suppliers

1. Log in to Basware Network.
2. At the top of the page, click **Network** to open the **Network** page.
3. Click **Vendors**.
4. If you have the **Vendor Manager Administrator** role, you can select if you want to view only a specific company or all companies. To do this, select the company or **All** in the drop-down list below the **My Vendors** title.
5. To search for a specific supplier, type the name, or part of the name, of the supplier in the **Search** field, and click 🔍.

   > To find more search options, next to the **Search** field, click ❯. For more information on using the search options, see Find a supplier using advanced search.

6. To filter the supplier list, click one of the filter boxes under **Quick filters** or **Categories**:

   Quick filters Ready-made filters that you can use to find the suppliers that you need:

Quick filter	Description
expired_documents	Suppliers that have documents where the expiration date is in the past.
import_open_api	Suppliers that have been imported through the Open API.
minority_owned	Suppliers that are owned by people belonging to a minority group. This quick filter is only available if suppliers are enriched using the optional Dun & Bradstreet feature.
missing_bank_details	Suppliers that are missing bank details.

Quick filter	Description
missing_address_details	Suppliers that are missing address details.
missing_contact_details	Suppliers that are missing contact details.
small_business	Suppliers that have a small number of employees and a relatively low volume of sales. This quick filter is only available if suppliers are enriched using the optional Dun & Bradstreet feature.
ui	Suppliers that have been created by making a supplier request.
Vendor_Master	Suppliers that exist in the customer's ERP system.

Categories   The system creates categories automatically, for example, to identify suppliers that have been invited to a campaign. You can also add and remove categories manually.

To stop using a filter, click the filter box again.

7. To view the information of a supplier, next to the supplier's name, click ❯ .

7.1.4.2 Find a supplier using advanced search

1. Log in to Basware Network.
2. At the top of the page, click **Network** to open the **Network** page.
3. Click **Vendors**.
4. If you have the **Vendor Manager Administrator** role, you can select if you want to view only a specific company or all companies. To do this, select the company or **All** in the drop-down list below the **My Vendors** title.
5. To view advanced search options, next to the **Search** field, click ❯ .
6. In the **Add criterion** drop-down list, select one of the following:

Option	Description
Organization's Identifier	Find a company using the company's identifier. Type the identifier.
ERP ID	Find a company using the identifier that you use in your ERP system. Type the identifier.
Country	Find companies from a specific country. In the drop-down list, select a country.
Data List Status	Find companies based on whether they have completed the requested data during registration. In the drop-down list, select **Complete** or **Incomplete**.
Source	Find companies based on how the supplier was added to Basware Network. In the drop-down list, select one of the following: • **Import API**: Imported through the open API • **Vendor Data**: Created as a result of an open campaign • **Dynamic Discount Agreement**: Created as a result of an invitation to the Dynamic Discount service • **Campaign Invitation**: Created by inviting the supplier with a goal-driven campaign • **UI**: Created as a result of a supplier proposal

Option	Description
Relationship Status	Find companies based on their status in the review and approval workflow. Select a status from the drop-down list. For information on the statuses, see Supplier statuses.
Connected since	Find companies based on when they were added to your supplier list. Select an option from the drop-down list.
Capabilities	Find companies with specific capabilities. For example, you can search for companies that are able to send invoices. Select an option from the drop-down list.
D&B Status	Find companies with a specific Dun & Bradstreet status. Select an option from the drop-down list. For information on the statuses, see Supplier statuses.
Vendor approval status	Find companies that have a specific status in the review and approval workflow. Select an option from the drop-down list. For information on the statuses, see Supplier statuses.

7. If you want to add another search option, in the **Add another criterion** drop-down list, select one of the options. See step 6.

8. Click **Search**.

7.1.4.3 Manage duplicate suppliers

If your company uses multiple ERP systems, it is possible that a supplier exists in more than one of them. In Basware Network, the supplier only exists as one entity, but you can view the details that the supplier has in each ERP system.

You must have the **Vendor Manager Administrator** role to be able to use this feature.

1. Log in to Basware Network.
2. At the top of the page, click **Network** to open the **Network** page.
3. Click **Vendors**.
4. Select the **Duplicate view** check box.

   The view shows a list of suppliers that share the same DUNS number.

7.1.4.4 Supplier statuses

The status of a supplier provides information on the their position in the review and approval workflow. If your company is using the supplier data enrichment service by Dun & Bradstreet (D&B), you can also view additional statuses from these services.

Table 3: Basic statuses

Status	Description
Candidate	The business partner has been imported to the system.
Confirmed	The business partner has confirmed the invitation to join your company's network.

Table 4: Statuses in the supplier approval workflow

Status	Description
Created	The supplier proposal has been created, but it has not been sent to review yet.

Status	Description
Review pending	The supplier proposal has been sent to review.
In review	The review process of the supplier proposal is ongoing.
Reviewed	The supplier proposal has been reviewed.
Needs update	The supplier proposal has been rejected in the review phase and sent back to the initiator of the proposal for more information.
Approval pending	The supplier proposal has been reviewed, and it is waiting for the approval process.
In approval	The approval process of the supplier proposal is ongoing.
Rejected	The supplier proposal has been rejected in the approval phase.
Approved	The supplier proposal has been approved.

Table 5: D&B statuses

Status	Description
Not Yet Sent	The supplier information is scheduled to be sent to the service.
In progress	The supplier information has been sent to the service, but no result has yet been received.
Matched	The service has found the supplier, but there was no information to receive.
Matched And Enriched	The service has found the supplier and received additional company information.
Not Matched	The service was unable to find the supplier.
Under Review	The process is not working as it should, and Basware is looking into it.

7.1.4.5 Add categories for suppliers

You can easily identify groups of suppliers by adding categories for them.

1. Log in to Basware Network.
2. At the top of the page, click **Network** to open the **Network** page.
3. Click **Vendors**.
4. To create a new category and add it to a supplier:
   a) In the drop-down list next to the supplier, select **New Category**.
   b) Type a name for the category, and press Enter.
   c) Click **Save**.

   The category is added to the supplier, and it appears as a filter in the **Categories** box.
5. To add an existing category to a supplier:
   a) In the drop-down list next to the supplier, select **New Category**.
   b) Start writing the name of the category, and select it from the list of proposed matches.
   c) Click **Save**.

   The category is added to the supplier.
6. To edit the category to change its name or add a description:

a) Above the **Categories** box, click ✏.

b) In the drop-down list next to the category that you want to edit, click **Edit**.

c) Edit the name as necessary, or type an optional description.

d) In the **Save** drop-down list, click **Save**.

You can use the categories to filter the suppliers when you view them.

7.1.4.6 Request suppliers to update their profile

When you want to ask a supplier to update their profile, you can do this quickly without creating a campaign.

1. Find the supplier that you want.

2. In the drop-down list next to the supplier, select **Update and enrich supplier data**.

   A pop-up window opens.

3. In the **Language** drop-down list, select the language of the message that is sent to the supplier.

4. In the **Select template** drop-down list, select the template, which defines the data content that is requested from the supplier.

5. Click **Send**.

7.2 Managing customers

Manage your network of customers on the **Customers** tab.

7.2.1 Importing new customers

You can add new customers to be added to your company's network by importing the customers' details into Basware Network.

7.2.1.1 Import your customers' details

You can add multiple customers' information into Basware Network by uploading a customer list.

If you do not have a customer list, you can create one first.

1. Log in to Basware Network.

2. At the top of the page, click **Network** to open the **Network** page.

3. Click **Customers**.

4. Click **Import Customers**.

5. In the **Import Customers** dialog, click **Add files**.

6. Locate your customer list, and click **Open**.

7. Click **Import**.

7.2.1.2 Create a customer list

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

1. Log in to Basware Network.
2. At the top of the page, click **Network** to open the **Network** page.
3. Click **Customers**.
4. At the bottom of the **Import Customers** dialog, click **Customer List Template**.
5. Save the customer list template on your local hard drive.
6. Open the customer list template.
7. Enter your customers' details on the customer list template.

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

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

    You can now import your customers' details into Basware Network.

7.2.1.3 File format of the customer list

You can import several customers' details into Basware Network simultaneously using a CSV-formatted customer list. The customer 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 customer lists exported from SAP by default. If you want to upload a customer list exported from another Enterprise Resource Planning (ERP) tool, make sure that the customer list uses the column names and file structure described below.

Once you have created the customer list, you can import your customers' details into Basware Network.

Company information

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

Table 6: Company information

Column Name	Description	Mandatory
erpId	Customer's identifier in your ERP system.	✓
partnerName	Official name of your customer.	✓
countryOfRegistration	Customer's country of registration.	✓

Column Name	Description	Mandatory
partyId	Customer's identifier. This may be the customer's VAT number, sales tax number, taxpayer identification number (TIN), or other public identification number. ℹ️ The CSV file must contain either this column, or the **contactElectronicMail** column.	(✓)
GLN	Customer's Global Location Number (GLN).	
DUNS	Customer's Data Universal Numbering System (DUNS) number.	

Contact information

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

Table 7: Contact information

Column Name	Description	Mandatory
contactType	Description of this contact	
contactName	Name of the contact	
contactElectronicMail	Email address ℹ️ 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 customer's address. This group consists of **six** columns. The group must be used at least once in the customer list, and the group can be repeated **three** times. This means that you can store three different addresses for each customer.

Table 8: 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 customer's bank accounts. This group consists of **nine** columns. The group must be used at least once in the customer list, and the group can be repeated **three** times. This means that you can store three sets of bank account details for each customer.

Table 9: Bank account information

Column Name	Description	Mandatory
bankName	Name of the customer'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 customer's bank	
iban	Customer's bank account number in IBAN format	
accountNumber	Customer's bank account number	
accountHolderName	Account holder's name	
currency	Currency of the bank account	

7.2.2 Find and view customers

1. Log in to Basware Network.
2. At the top of the page, click **Network** to open the **Network** page.
3. To search for a specific customer, type the name, or part of the name, of the customer in the **Search** field, and click 🔍.

> To find more search options, next to the **Search** field, click ❯.

4. To filter the customer list, click one of the filter boxes under **Quick filters** or **Categories**:

   Quick filters Ready-made filters that you can use to find the customers that you need.

   Categories The system creates categories automatically, for example, to identify business partners that have been invited to a campaign. You can also add and remove categories manually.

   To stop using a filter, click the filter box again.

5. To view the information of a customer, next to the customer's name, click ❯.

7.2.3 Add categories for customers

You can easily identify groups of customers by adding categories for them.

1. Log in to Basware Network.
2. At the top of the page, click **Network** to open the **Network** page.
3. Click **Customers**.
4. To create a new category and add it to a customer:
   a) In the drop-down list next to the customer, select **New Category**.
   b) Type a name for the category, and press Enter.
   c) Click **Save**.

      The category is added to the customer, and it appears as a filter in the **Categories** box.

5. To add an existing category to a customer:

    a) In the drop-down list next to the customer, select **New Category**.

    b) Start writing the name of the category, and select it from the list of proposed matches.

    c) Click **Save**.

       The category is added to the business partner.

6. To edit the category to change its name or add a description:

    a) Above the **Categories** box, click ✏.

    b) In the drop-down list next to the category that you want to edit, click **Edit**.

    c) Edit the name as necessary, or type an optional description.

    d) In the **Save** drop-down list, click **Save**.

You can use the categories to filter the customers when you view them.

7.2.4 Update your company's profile for a customer

Your customer may send you a request asking you to check your bank details or contact information. You can do this on the **Customers** tab.

1. Log in to Basware Network.

2. At the top of the page, click **Network** to open the **Network** page.

3. Click **Customers**.

4. Next to the customer's name, click ❯ to expand the section.

5. Under **Data List**, click **Edit**.

6. Check and edit the information as necessary.

7. Click **Save**.

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
- Set up dynamic discounting programs
- Update and enrich supplier data

Campaign types

You can create different types of goal-driven campaigns based on what the needs of your business are:
Table 10: 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 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

8.1.1 Create campaign and set campaign goals

1. Log in to 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 payment**.

   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 terms 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:

   - **Activated 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 that 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 that you want to set as the primary goal of your campaign.

8. Click **Next** to set the campaign parameters.

8.1.2 Set campaign parameters

1. In the **Campaign name** field, enter a name for the campaign.

2. Set the start and end dates for the campaign:

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

   b) In the **Start time** drop-down list, select the start time of the campaign.

   c) 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 methods**, select **Email - Basware delivers the link to the landing page to the invitees (RECOMMENDED)**.

5. To use email addresses stored in Basware Network, select the **Use Basware emails** check box.

6. Click **Next** to choose the invitees.

8.1.3 Choose invitees

1. Import invitees from CSV files (optional).

   a) Next to **Import CSV file**, click ❯ to expand the section.

b) To import a CSV file, click **select files**, or drag and drop a CSV file to the gray area.

c) From the **Email language** drop-down list, select the language of the email message you want to send to these recipients.

> ℹ️ 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) Next to **Paste multiple mails**, click ❯ to expand the section.

b) Paste a group of email addresses in the text box.

All email addresses that you paste at a time are 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) Next to **Add single recipient**, click ❯ to expand the section.

b) Enter the invitee's details in the **First Name**, **Last Name** and **Email** 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.

8.1.4 Set up the landing page

If you want to customize the landing page, you can add your company logo and custom message.

1. To add your company's logo to the landing page, click **select files**, or drag and drop your company's logo to the **Company logo file** area.

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

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.

8.1.5 Set up the invitation

1. In the **Reply to email** field, enter the email address that you want the reply email to be sent to when the recipient replies to the invitation email.

2. Add your company's logo to the email message (optional).

   a) Select the **Use company logo in invitation email** check box.
   b) To add your company's logo, click **select files**, or drag and drop your company's logo to the **Specify another company logo** area.

3. Add attachments to the email message (optional).

   a) To add an attachment, click **select files**, or drag and drop your attachment to the **Attachments** section.

4. Click **Preview Email** to preview the email before you send it.

5. Click **Send test 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.

8.1.6 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.

8.2 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.

8.2.1 Create campaign and set campaign goals

1. Log in to 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 payment**.

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 terms 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:

   - **Activated 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 that 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 that 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 end dates for the campaign:
   a) Click the **Start date** field to set a start date for the campaign.
   b) In the **Start time** drop-down list, select the start time of the campaign.
   c) 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 methods**, select **No email. I will contact the supplier myself**.
5. In the text 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.

8.2.3 Set up the landing page

1. To add your company's logo to the landing page, click **select files**, or drag and drop your company's logo to the **Company logo file** area.

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

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.

8.2.4 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.

8.3 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.

8.3.1 Create campaign and set campaign goals

1. Log in to 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 payment**.

    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 terms 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:

   - **Activated 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 that 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 that 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 end dates for the campaign:
   a) Click the **Start date** field to set a start date for the campaign.
   b) In the **Start time** drop-down list, select the start time of the campaign.
   c) 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 methods**, select **No email. I will contact the supplier myself**.
7. In the text field, define the URL that you want to use for the campaign.

> ℹ 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.

8.3.3 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.

8.4 End and restart campaigns

8.4.1 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. Next to the campaign that you want to end, click **End now** to end the campaign.

8.4.2 Restart an expired campaign

You 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. Next to the campaign that you want to restart, click **Edit**.

3. Click the **Start date** and **End date** fields to set a new start and end date for the campaign.

4. Click **Save** to save your changes and restart the campaign.

8.5 Campaign statistics

8.5.1 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 drop-down list next to the campaign you want, select **Download CSV file**.

   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.

8.5.2 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 11: 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 is tracked in columns P-X:

Table 12: 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 contains the value FALSE.

Column	Field content	Information
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 contains 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, this field contains 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.
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 has not yet confirmed the user account.
V	Account used	Contains the timestamp of when the user logged in to 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 contains 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 is tracked in columns P-X:

Table 13: 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 contains 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 contains 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, this field contains 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 has not yet confirmed the user account.
V	Account used	Contains the timestamp of when the user logged in to 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.
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 contains the value FALSE.

8.5.3 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 the same for each campaign type, the information stored in certain columns is only applicable to specific campaign types. If a column is applicable to a specific campaign type only, this is 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 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 that 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.
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.

CSV column	Field content	Comment
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 that 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 confirmation link in the confirmation email that they received.
V	Account used	Contains the timestamp of when the user logged in to Basware Network for the first time.
W	Service activated	Contains the timestamp of when the user successfully completed the configuration of the service that 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, this field contains 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 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, receive an email notification from the service once your business partner replies to your message.
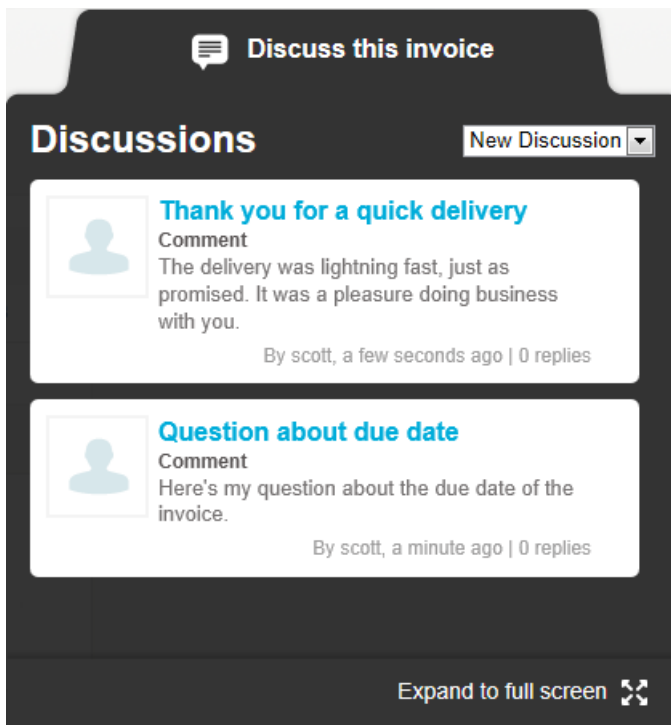
Figure 14: Discussion panel

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 in to **Basware Network**

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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 select the **I accept the Basware General Terms** check box.

8. Click **Activate** to activate the service.

9.2 Send a message to your business partner

> ℹ️ 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.

   > ℹ️ The discussion panel is not available on draft invoices.

3. From the **New Discussion** drop-down list, select the type of discussion you want to open.
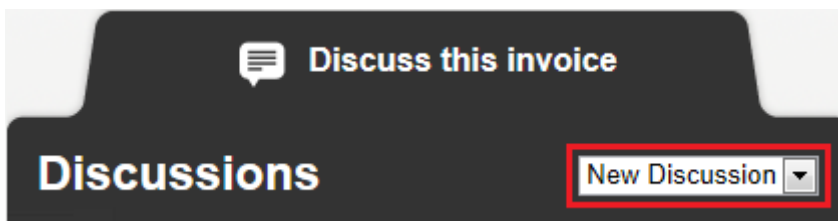
Figure 15: New Discussion drop-down list

4. In the **Topic** field, enter a subject for the message.

5. In the **Comment** field, enter the message to your business partner.

6. Click **Send**.

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

> ℹ️ 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.
   - To disable notifications, clear the **Activate** checkbox.

6. Click **Save**.

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** pop-up window that lets you send questions to Basware Support.
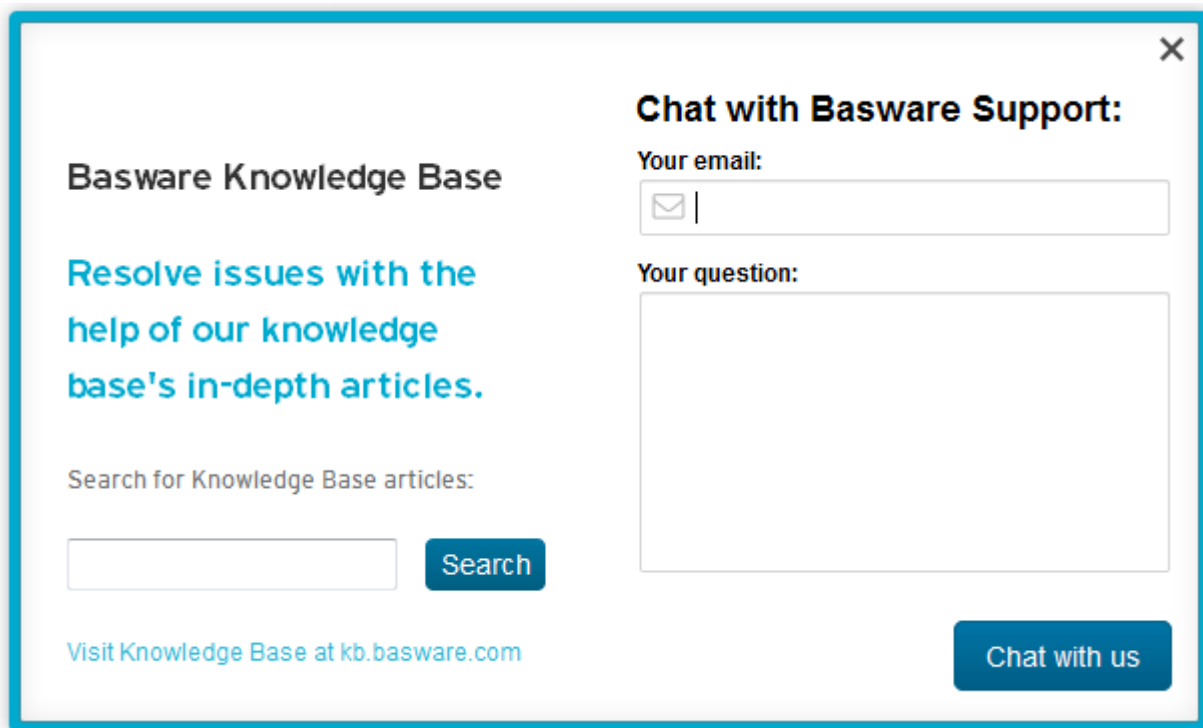
Figure 16: Chat with Basware Support popup window

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 14: 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 15: My Account Fields

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.
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.
Country	The country of your office	*United States*
Phone	Your phone number	*555-3226*
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

C.2 My Organization

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

Table 16: 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 Logo	Your company's logo	You can upload a logo in GIF, JPEG, or PNG format.

Table 17: Organization's Identifiers

Field name	Description	Notes
Organization 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. ℹ️ If your organization is located in the European Union, you must fill in a valid organization identifier in the **Organization Identifier** field. Without a valid identifier, organizations in the EU cannot send invoices.	VAT: *GB999 9999 73* Tax Identification Number: *12-3456789* DUNS: *123456789* GLN/EAN: *1234567890123*

Table 18: 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 19: 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	Check box. When selected, this address above is used as the default delivery address on new business documents.	
Use This Address as the Ship From Address	Check box. When selected, this address above is used as the default ship from address on new business documents.	

Field name	Description	Notes
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 20: 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 21: 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	Check box. When selected, the endpoint is shown, for example, in the list of possible recipients along with your company name when suppliers create invoices in Basware Network.	

Table 22: 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 23: Notifications

Field name	Description	Notes
Pre-approval Required	Check box. When selected, 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*
Language	Language of the notification.	*English (United States)*

Table 24: 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	*GB29NWBK60161331926825*
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 25: 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 26: Permitted Payees

You can add one or more permitted payees to your company's profile. When you are 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 27: Hide Organization in Directory

Field name	Description	Notes
Hide Organization in Directory	Check box. When selected, your organization is not shown in the business directory.	

C.3 Invoices

ℹ️ 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.

ℹ️ 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 28: 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	
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. ℹ 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	Drop-down 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 a mandatory field that the sender must fill in. When a value is filled in, Basware Network calculates all sales tax amounts also in the local currency.	*1.23*
Comment	The supplier can add a message to the buyer in this field.	
Shipment Number	Identification number of the shipment	*BG123321123321*

Field name	Description	Notes
Payment Penalty Rate	Rate at which the customer is 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 29: 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 ℹ 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 percentage.	*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 30: 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)

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