



User Guide

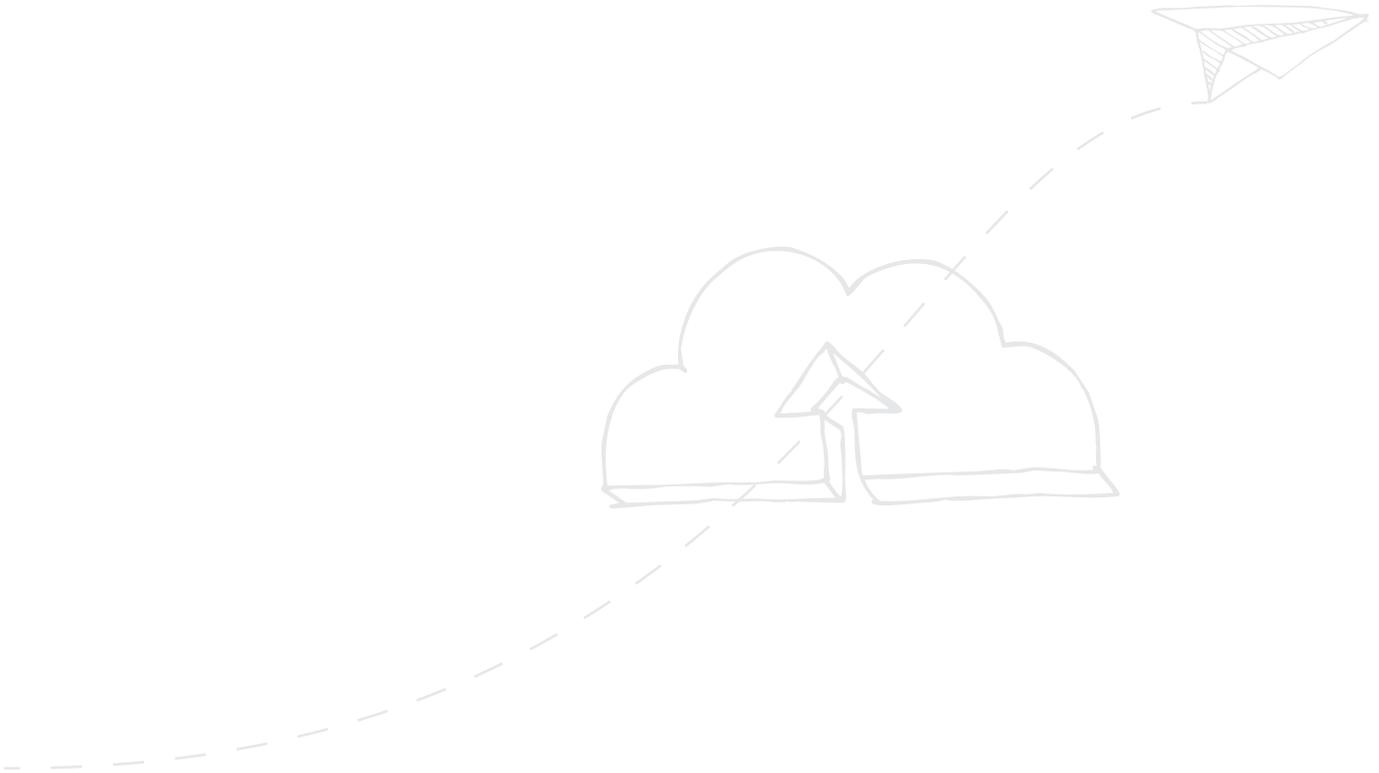
Basware Invoice Key-In and PO Flip



1 Service Overview

Basware Invoice Key-In and PO Flip service lets you receive electronic orders from your customers. The service notifies you of new orders the moment your customers send them in, and you can view the orders with your browser in Basware Portal from anywhere in the world.

In Basware Portal, you can convert shipped orders to e-invoices in the service and send them over to your customers with the click of a button. The **Discuss This Document** feature lets you discuss individual orders and invoices directly with your customers.



2 Opening and Closing the Application

This section describes how you can open and close Basware Portal application.

2.1 Opening the application



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

2.2 Closing the application



in the top-right corner of the page, click **Your Username** > **Logout**.



You will be automatically logged out of Basware Portal after five minutes of inactivity.



3 Managing Business Documents

This section describes how you can manage business documents using Basware Portal.

3.1 Searching for business documents

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



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

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

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

Figure 1: Search Results table

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

(Sort by: Invoice Date ▾ Due Date ⌵)

Figure 2: Sort by labels

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

3.2 Using advanced search



1. Enter a business document number in the **Search** field.
2. To filter business documents by business document details, add the filters you want to use:
 - a. Click  to open the **Advanced Search** view.
 - b. Enter the filters that you want to use:
 - **Sender:** Show business documents from a specific sender.

- **Recipient:** Show business documents sent to a specific recipient.
 - **Last Updated:** Show business documents that have been updated within the defined period.
 - **Invoice Date:** Show business documents, whose invoice date is within the defined period.
 - **Due Date:** Show business documents, whose due date is within the defined period.
 - **Gross Total:** Show business documents, whose gross total amount is within the defined limits.
3. Click **Search**.
The results that match your query are displayed in the **Search Results** table.
 4. To sort the list of results, click on the **Sort** labels:

(Sort by: **Invoice Date** ▾ **Due Date** ⚡)

Figure 3: Sort by labels

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

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

3.3 Converting purchase orders into invoices

This section describes how suppliers, who use **Basware Invoice Key-In and PO Flip** service, can convert purchase orders into invoices.



1. On the **Documents** view, click on a purchase order you want to convert into an invoice to open it.
2. Click **Accept** to accept the purchase order.
The **Accept Purchase Order** popup opens
3. Select the delivery date of the order by clicking the **Confirm delivery date** field and selecting the date from the calendar that opens.
4. Enter any comments to the recipient in the **Comments to buyer** field.
5. Click **Confirm** to continue.
The purchase order is now in accepted status, and you can convert it into an invoice.
6. 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.

3.4 Sending invoices

After you have converted a purchase order into an invoice, Basware Portal opens the **Edit invoice** view. On this view, you can confirm the invoice details and make any changes to the invoice contents.



1. Fill in missing invoice data.
Missing, mandatory items are highlighted with blue color.
2. If you need to make any changes to the invoice content, make the changes.
 - Add or remove invoice lines on the **Line Data** tab.
 - Add attachments to the invoice on the **Files** tab.

For general information on creating an invoice, see [Creating invoices](#).

3. Click **Send Invoice** to send the invoice.

3.5 Creating invoices

This section describes how suppliers, who use **Basware Invoice Key-In and PO Flip** service, can create invoices.



1. On the **Documents** view, click **Create New Document**.
2. From the drop-down list, select **Invoice**.

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

3. Select a sender.

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

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

The **Select Sender** view opens.

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

Your favorite organization is marked with the ★ icon.

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

4. Select a recipient.



You can only select organizations, who have activated the **Basware E-Orders and E-Invoice Receiving** service, as the recipient.

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

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

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

Basware Portal validates the contents of the fields and notifies you if the content of the field does not pass validation.
6. Enter the line data.
 - a. On the **Line Data** tab, click **Add Line** to add a new invoice line.
 - b. Enter the details of the line item.
 - c. Click **Add Line** to add another line item, if necessary.
7. 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.
8. Click **Send Invoice** to send the invoice to your customer.



4 Field Names and Descriptions

4.1 Invoices



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

Table 1: Invoice Fields

Field Name	Description	Notes
Invoice Date	Date of the invoice.	Can be set a maximum of 35 days in the past. For example, if the current date is July 6th, the earliest date you can select is June 1st.
Due Date	The date on which the invoice must be paid.	
Invoice Number	A unique identification number of the invoice	Invoice number can contain letters, numbers, and special characters. The maximum length of the invoice number is 16 characters.
Recipient's e-Invoicing Address		
Sales Tax Number	Your organization's sales tax number	
Supplier's Reference Number		
Order Reference		
Freight	The charge for transporting the ordered goods	
Supplier's Contact Person		
Recipient's Contact Person		
Payment Terms	Conditions related to the payment of the ordered goods	
Currency	Currency used on the invoice	
Comment		
Handling Fee	The cost of packaging and mailing an order	