basware

User manual

Your Basware account

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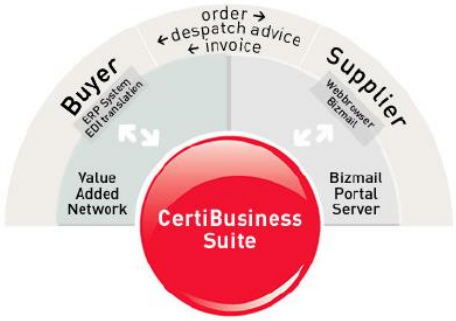
I. Introduction

A. Introducing BaswareONE

BaswareONE (http://www.baswareone.com), developed and supported by Basware, BaswareONE is the network of choice for companies exchanging business documents online with their customers and suppliers. Purchase orders, despatch advices, e-bills and e-invoices; companies from all over Europe rely on BaswareONE on a daily basis for swift and secure business transactions. BaswareONE provides 2 tools for smart document exchange: A Basware account for manual interaction through a web browser, and Bizconnect for automated integration into back-office applications.

1. Your Basware account: manual interaction

Your Basware account is a professional web-based email client for exchanging business documents with trading partners. Your Basware account lets you view, modify and reply to business documents, like orders or invoices, as if you were working with standard webmail. Your Basware account goes beyond the concept of WebEDI: more message formats, more trading partners, more productivity and more usability. Your Basware account allows you to receive and send any data format – from XML to EDI -, without actually having such technology: all the work is done through a web browser, connecting you with the central BaswareONE server.



2. Bizconnect: automated

Bizconnect for BaswareONE has been specially developed to download files automatically in a default BaswareONE file format. These files can be easily integrated in your business application, bookkeeping software or ERP system. Doing so, you can link your organization with your clients and suppliers. Bizconnect security combined with server authentication and 128-bit SSL encryption make y a completely waterproof system, allowing for secure and confidential document traffic.

Bizconnect is a standalone communication client to connect to the BaswareONE server. This version of the Bizconnect has been developed for use with BaswareONE only. Typical BaswareONE features include the standard upand download directory structure, a batch file executing a predefined script and standard BaswareONE FTP connection checks. All this makes Bizconnect perfect for exchanging business documents with trading partners in the retail industry. Bizconnect is lightweight yet powerful, easy to use and above all secure. Bizconnect enables you to do business transactions over the internet using secure FTP, without the need for specific andexpensive infrastructure. For the first time, retail suppliers including small and medium-sized enterprises can comply with the complex document

content, format and integration requirements required by their retail customers, without having to upgrade their infrastructure.

B. Requirements

1. Hardware requirements

In order to operate your Basware account correctly, you need a personal computer with the following hardware:

- Intel Pentium or equivalent processor, minimum 233 MHz;
- 128 MB of internal memory;
- A colour monitor with a minimum resolution of 1024 x 768 and a screen colour depth of 256 colours;
- A high-speed internet connection (ISDN, ADSL, xDSL, cable, ...) is recommended.

NOTES:

1. Your Basware account is not supported on non-PC compatible hardware, including mobile phones, PDA's or Apple.
2. If you connect using a proxy server (for instance, when using a cable or xDSL connection) or through a firewall, read the Frequently Asked Questions sections of this manual carefully about proxy server and firewall configurations.

2. Software requirements

Your Basware account needs one of the following operating systems to operate correctly

- ✓ Windows 95/98
- ✓ Windows NT version 4.0 or later
- ✓ Windows 2000
- ✓ Windows XP

3. Browser requirements

Your Basware account needs one of the following operating systems to operate correctly

- ✓ Microsoft Internet Explorer 5.5 or later
- ✓ Mozilla Firefox 1.0 or later
- ✓ Javascript enabled
- ✓ Pop-up blockers disabled
- ✓ Due to a known browser conflict, Internet Explorer 5.0 on Apple Macintosh OS X may not properly display your Basware account top navigation bar. Apple users are advised to use Mozilla Firefox as browser.

II. Your Basware account

A. Introducing your Basware account

1. What is a Basware account?

Your Basware account is a professional web-based e-mail client for exchanging business documents with trading partners.
Your Basware account lets you view, modify and reply to business documents, like orders, despatch advices or invoices, as if you were working with standard webmail. For instance, you can read an incoming order, automatically create an acknowledgement, modify the delivery address and send a confirmation, no matter which system your trading partner uses.

2. Enabling communication

B2B communication can consist of a multitude of transactions and documents (for example, purchase orders, shipping notifications, invoices, information requests, stock queries, etc.) that computers actually perform better than people. However, this electronic business communication uses a multitude of different formats and standards. Companies use a wide variety of applications to store business information: different types of databases, different business applications, and different back-office systems. Small companies cannot afford to invest in such elaborate data storage and exchange systems, due to the limited return on investment. In turn, the bigger companies want to conduct all of their business using their own, advanced, electronic systems. Your Basware account meets both needs.

B. Communication formats

A short overview of the main message formats supported by BaswareONE will make you understand most commonly used abbreviations in this manual.

1. XML

XML (Extensible Markup Language) is a simple, standard way to structure text data for online use. Designed for use on the Web, XML markup takes the form of tags, just like in its parent language, SGML. XML users can create their own customized tags. This feature makes it suitable for the transmission of data between applications as well as between organizations. Your Basware account uses XML to display audit information about sent and received messages.

2. EDI

EDI (Electronic Data Interchange) is a standard format for exchanging business data. It is a standard format for computer-to-computer transmission of structured business data. Standards include EDIFACT, EANCOM and ANSI X12. An EDI message contains a string of data elements, each of which represents a singular fact, such as a price, product model number, and so forth, separated by delimiter. The entire string is called a data segment.
The parties who exchange EDI transmissions are referred to as trading partners.

EDI is the format used by trading partners worldwide to exchange information with their trading partners, including their suppliers. BaswareONE translates EDI messages from trading partners into other formats like HTML for web-pages, XML or ASCII and vice versa, through usage of an intermediate standard XML defined by Basware.

3. HTML

HTML (HyperText Markup Language) is the standard for publishing text on the Web. As in XML, tags are used, but in HTML these tags contain nothing but formatting information. Also, there is a fixed list of available tags, which can not be extended by users.

4. ASCII/MRT

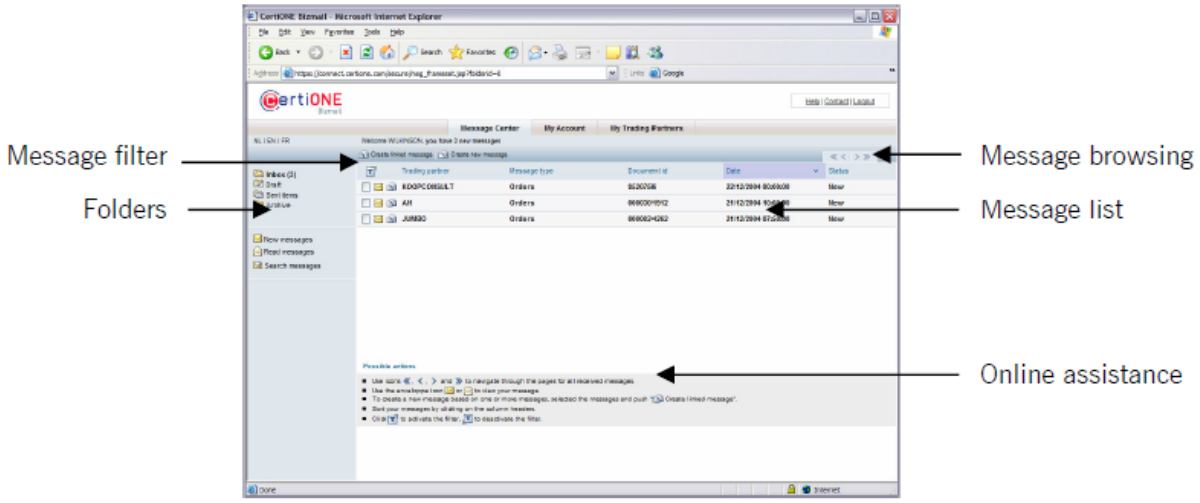
ASCII (American Standard Code for Information Interchange) is a seven bit code with an eighth bit used for parity.
ASCII is the most common format for text files in computers and on the Internet. In an ASCII file, each alphabetic, numeric, or special character is represented with a 7 digit binary number (a string of seven 0s or 1s). 128 possible characters are defined. The term ASCII is used to describe the format for transmission and for storage of data in pure text format, with no markup or structure whatsoever: message fields in this format are delineated by position only. This is why some people call this type of messages flat files. Another name for an ASCII file is MRT: Multiple Record Type. This indicates that this kind of file can be used for a wide variety of purposes.

Basware nv identifies two different types of ASCII files: delimited files and fixed length files. A fixed length ASCII file, is a file where each line (record) has a predefined length. Each piece of data has a fixed length. A delimited ASCII file is a file where each line (record) consists of data elements which are separated by a fixed character, e.g. a semi-colon. ASCII, XML and EDI files can be exchanged with BaswareONE using Bizconnect or another certified communication client. Downloaded files can be integrated into your business application (ERP system, accountancy software, ...).

C. Basic terms and standards used

In order to make a business document readable and comprehensible all over the world, it has a particular structure. This structure depends on agreements between organizations (like the United Nations), countries and trading partners. Thanks to this structure, computers and applications of different trading partners can directly communicate with each other. Please remember that with standard, unstructured e-mail, this is impossible.

1. Messages and folders



- ✓ There are many different types of messages, like purchase orders, despatch advices, invoices... with different states.
- ✓ As in an email client, messages are stored in different folders, depending on their type and state. As such, newly received messages are stored in the 'Inbox' folder; newly created messages (but not yet sent) are stored in the 'Draft' folder; messages sent are stored in the 'Sent Items' folder and fully handled messages in the 'Archive' folder.
  - Inbox
  - Draft
  - Sent Items
  - Archive
- ✓ Each message is depicted by an envelop icon, which you can click to view its details.
  - A new message
  - A read message
- ✓ A message consists of one or more detail lines.

2. Message list

All message listings are displayed in an identical way, and contain common functionalities like sorting and filtering.

Sorting

Default, the message list is sorted by date, but clicking the column header changes the sort order accordingly, the first time in descending order, the second time ascending.

Filtering

- ✓ The message list also contains a filter function, which allows you to further filter the current list in the folder. Click the filter icon to show the filter above the message list. The message filter allows you to combine any of the following filters:
  - Enter a trading partner's name;
  - Select one of the messages types from the dropdown list;
  - Enter a particular document id;

- Enter from/to date or select one from a date helper by clicking the next icon next to the field.
- Select a status from the dropdown list

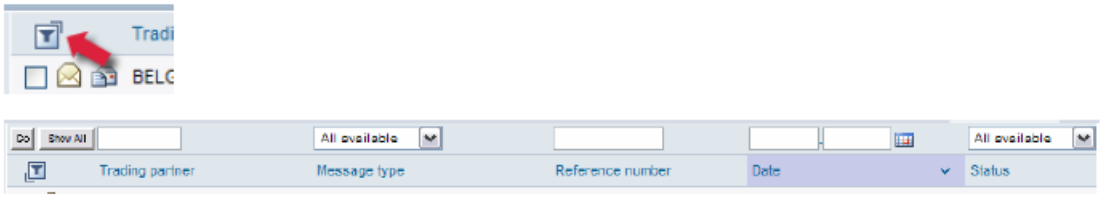


Illustration 1: Message filter

The date helper allows you to select a from and to date from a dropdown list, or pre-configured dates like ‘Today’, ‘Yesterday’, ‘This week’, ‘Last week’, ‘This month’, ‘Last month’, ‘Last year’, and ‘Last XX days’. Click ‘OK’ to apply your selection, or click ‘Clear’ to clear the date selection.

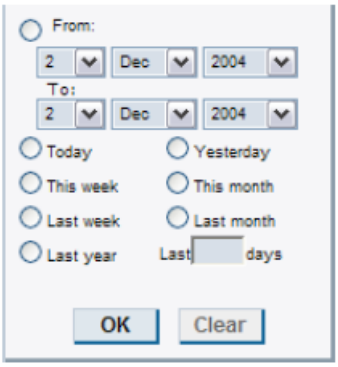


Illustration 2: Date helper

Click ‘Go’ to apply your filter selection. Click ‘Show All’ to clear your filter selection and display the original unfiltered list. Click the filter icon again to clear the filter selection and hide the filter section.

Navigation

Whenever a list is longer than a given default value - for the message list this is set to 10 messages, this parameter is called blocksize - the list navigation allows you to navigate through the long list. The list navigation is available in the taskbar and whenever a list is displayed throughout the application (for example address list, product list). It allows you to navigate to the ‘next’ and ‘previous’ page, as well as to the ‘first’ and ‘last’ page in the list view.

3. Message view

The message view opens up in a pop-up browser window containing the message taskbar and the message’s content.

Depending on the message type and the message status, the taskbar will differ on the available actions you can do on the message:

- ✓ ‘VIEW’
- ✓ ‘EDIT’
- ✓ ‘SAVE’
- ✓ ‘SAVE AS DRAFT’
- ✓ ‘SAVE & SEND’
- ✓ ‘CREATE LINKED MESSAGE’

If you change message data in the message view, the colour of the ‘SAVE’ action will change to warn you that you need to click this action in order to submit your changes to the system. Each new message view request will open in the same pop-up window, removing the previous display.

Additionally, each message view contains the following generic functions:

- ✓ : ‘pin down’ the window. By default each new message view request will open in the same pop-up window, removing the previous display. With this ‘pin down’ function you can keep this display open when requesting another message view, which opens in another pop-up browser window. This way you can compare two or more message. Click again to ‘unpin’ the window;
- ✓ : print the message;
- ✓ : close the window. Clicking this close icon in stead of the close button of the browser window, allows for the system to check and alert you in case you made changes to the message but didn’t save those changes.

D. Logging on

The BaswareONE website can be found at http://www.baswareone.com.

1. Start your browser, type http://www.baswareone.com in the address bar and click Go.

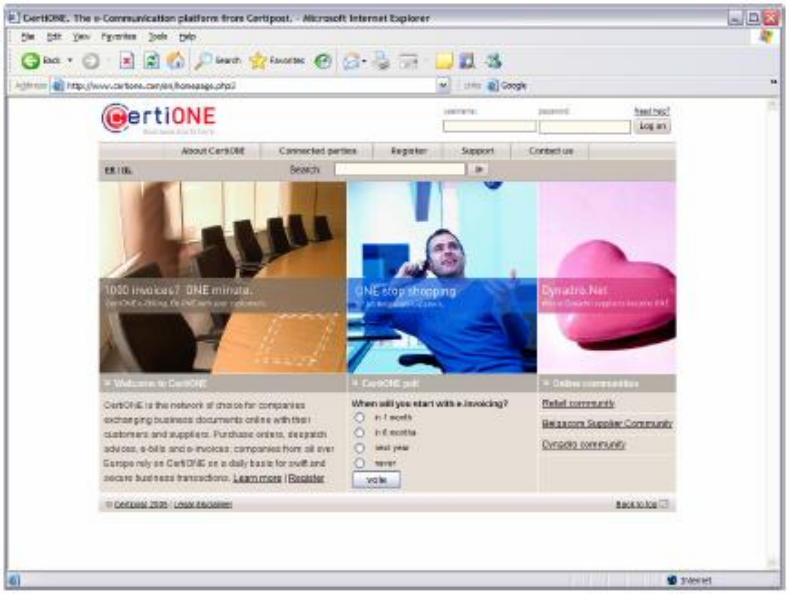


Illustration 3: CertiONE.com homepage

2. You will be directed to the BaswareONE Log on page. On this page, fill in your username and password. Please keep in mind that both username and password are case sensitive,

this means that you should distinguish uppercase from lowercase and letters from numbers. Typical sources of confusion are the differences between l (lowercase L) and I (uppercase i) and between O (uppercase o) and 0 (zero).

3. Click the 'Logon' button.

Note: Whenever you leave your desk, you should log out of the application, to prevent others from using or abusing your account. To log out, click the 'Logout' link in the top-right corner of your Basware account window.

Message center

If you have logged on successfully, you will be directed to the your Basware account Message Center. This Message Center offers you links to the Inbox, the Draft, the Sent Items and the Archive folder, a list of new and read messages, and a messages lookup form.

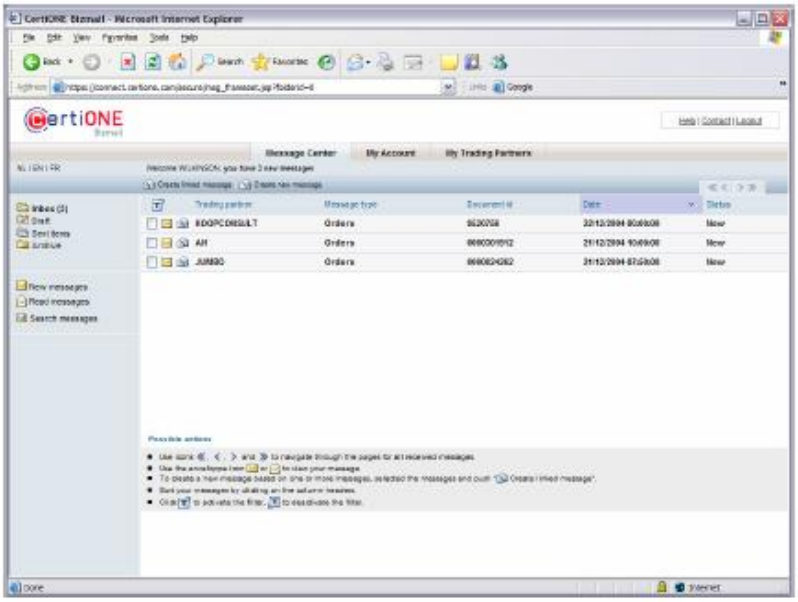


Illustration 4: Message Center

By default, the Message Center displays the list of messages in your Inbox folder, ordered by date. Additionally, links are available to consult your account data, and your trading partners. There's also a link available to change the language setting of the portal.

Note: You can contact the Customer Care service by clicking the 'Contact' link in the top-right corner of the window, and fill in your contact details and remarks, questions… You can consult the online help pages by clicking the "Help" link in the top-right corner of the window.

E. Your Basware account folders

This section will give you an overview of your Basware account taskbar, workflow, folders and their respective functions and statuses.

1. Workflow

The workflow is defined on two levels. On the one hand there are messages, on the other hand we have folders. The location of a message in a folder depends on the status of the message. This figure shows the workflow of messages over all folders.

There are several message types available:

- ✓ Purchase orders (order)
- ✓ Automatic acknowledgment(aperak)
- ✓ Order confirmations
- ✓ Delivery notes (desadv, short for despatch advice)
- ✓ Invoice
- ✓ Payment status

You can retrieve a list of all available messages types per trading partner in the “My Trading Partner” section. This figure shows the flow between messages.

When an Order message is read for the first time, an Aperak message - an automatic acknowledgement - is sent to the sender, only in case the sender has requested for a receipt message.

Next, based on an Order message, you create and send a Despatch Advice. The Despatch Advice is later followed by an Invoice message. Corrections on Invoices can be generated, as well as empty invoices (not based on a Despatch Advice). In some cases it is also possible to partially deliver the items of an order by creating multiple Despatch Advices on one Order message. The same logic applies to invoices: multiple Invoice messages can be created on one Despatch Advice.

2. Taskbar

Depending on the folder selected, a different taskbar is shown, with different actions. The taskbar allows you to select several messages from the list, and assign the same action to the selected messages (for example remove several messages at once). Some actions are only possible on messages with the same status.

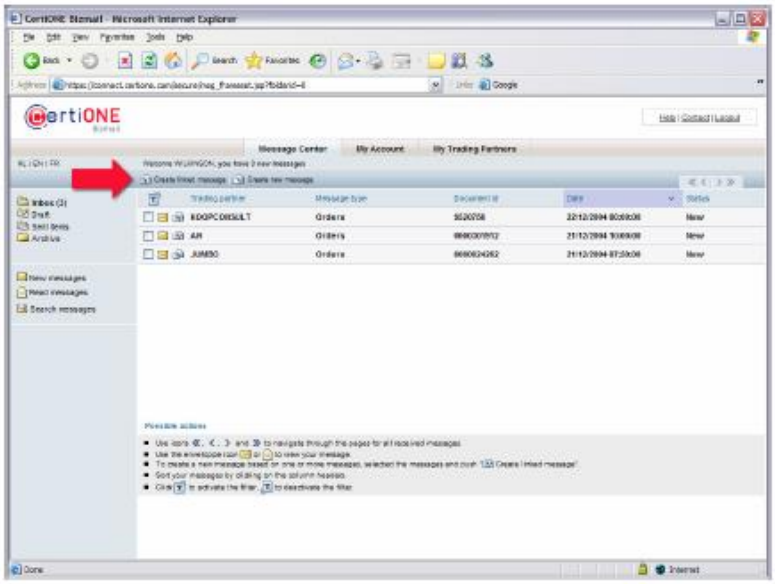


Illustration 5: Taskbar

Following actions are available to you in the taskbar:

Icon	Command	Desciption
	create linked message	create a new message linked to an existing message
	create new message	create a new empty message
	send message	sends the selected message(s)
	remove message	permanently removes the selected message(s)

3. Inbox

Your Basware inbox contains all new incoming messages, sorted by date, with the newest message at the top. The list displays the trading partner, the message type, the document id, the date and the status of the message (received). You can click the column headers to change the sorting accordingly.

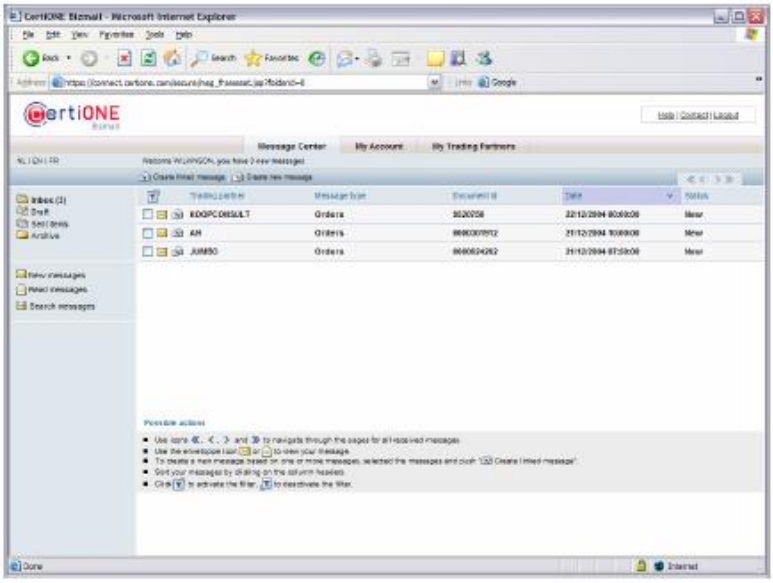


Illustration 6: Inbox folder

An incoming message can be of many of possible message types, e.g.:

- ✓ Order

An incoming message can have the following statuses:

- ✓ 'New': a new message that has not yet been read;
- ✓ 'Viewed': a new message that has been viewed (and receipt acknowledgement has been sent, when asked);
- ✓ 'Partially invoiced': message for which a partial invoice has been created or sent;
- ✓ 'Partially despatched': message for which a partial despatch advice has been created or sent;
- ✓ 'Partially confirmed': message for which only part of the message lines have been confirmed (positively or negatively).

Each individual message allows you to:

- ✓ view the message by clicking the envelope icon:

  : a new message

  : a previously read message

- ✓ : create a linked message for the particular message;
- ✓ Select the checkbox to handle multiple messages at once through the taskbar.

The taskbar for the Inbox allows you to:

- ✓ : create a linked message, linked to one or more messages. Select the messages in the list and push 'Create linked message';
- ✓ : create a new, empty message.

The message list also contains a filter function to further filter the current list. You can also click the column headers to change the sorting accordingly.

4. Draft

Click the ‘Draft’ folder link on the left to change the display to the draft messages list. The draft folder contains all created or modified messages, like despatch advices, invoices and order confirmations.

Messages in the Draft folder can have the following status:

- ✓ ‘Created’: a new message, ready to be modified;
- ✓ ‘Modified’: a message which has been created and/or modified, ready to be send.

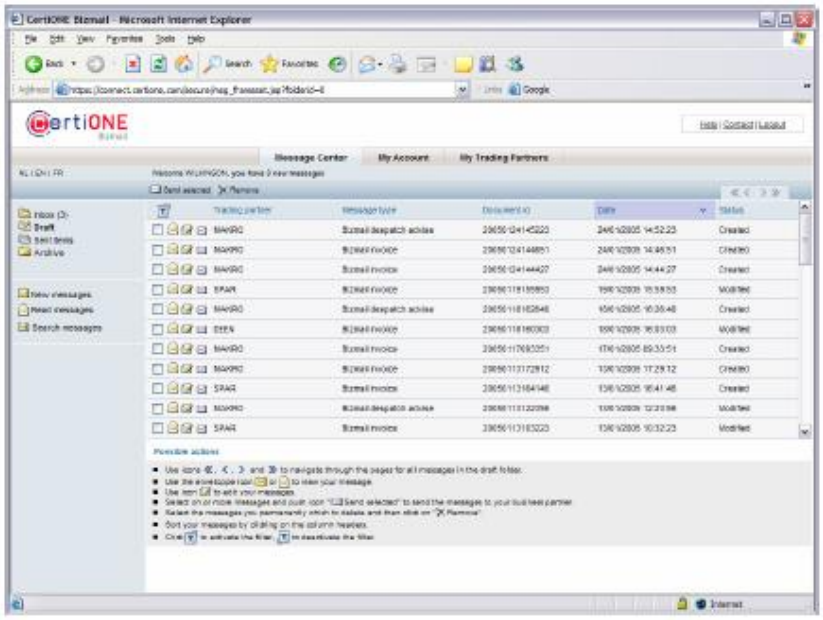


Illustration 7: Draft folder

Each individual draft message allows you to:

- ✓ : view the message by clicking the envelope icon;
- ✓ : edit the message by clicking the edit icon;
- ✓ : send the message by clicking the send icon;
- ✓ Select the checkbox next to a message to handle multiple messages at once through the taskbar.

The taskbar for the Draft folder allows you to:

- ✓ : send the selected messages;
- ✓ : Permanently remove the selected messages.

The message list also contains a filter function to further filter the current list. You can also click the column headers to change the sorting accordingly.

Note: You can’t send a message with status created. Some required fields must be filled in first. This means the message can only be sent when it has status ‘modified’.

5. Sent items

Click the ‘Sent items’ folder link on the left to change the display to the sent items messages list. The ‘Sent items’ folder contains all the outgoing messages:

- ✓ Despatch advice
- ✓ Invoice
- ✓ Order Confirmation
- ✓ …

Messages can have the following statuses:

- ✓ ‘Sent’: the message was sent;
- ✓ ‘Invoiced’: a message for which all message lines have been invoiced;

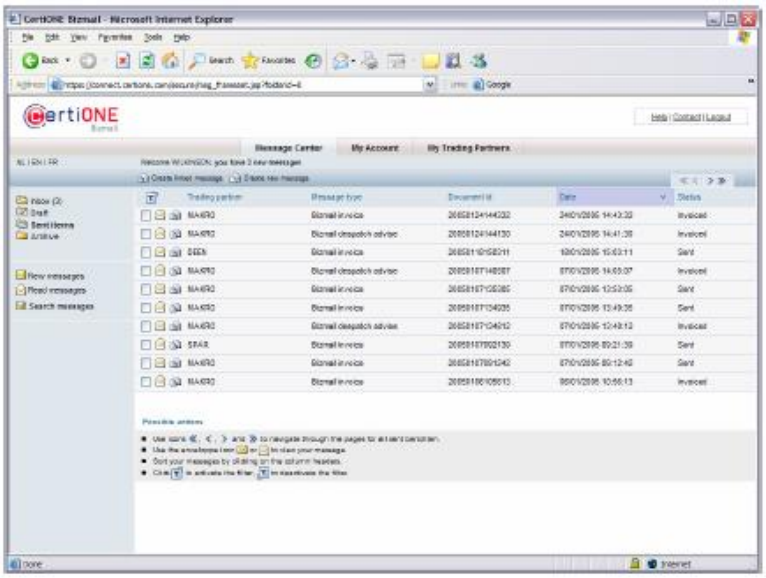


Illustration 8: Sent items folder

Each individual sent message allows you to:

: view the message by clicking the envelope icon;

Select the checkbox next to a message to handle multiple messages at the same time through the taskbar.

Create a linked message, linked to one or more messages.

The taskbar for the ‘Sent items’ allows you to:

: create a linked message, linked to one or more messages. Select the messages in the list and push ‘Create linked message’;

: create a new, empty message.

The message list also contains a filter function to further filter the current list. You can also click the column headers to change the sorting accordingly.

6. Archive

Click the ‘Archive’ folder link on the left to change the display to the archived messages list. The archive folder contains all incoming messages with a status different from New, e.g. ‘Order’.

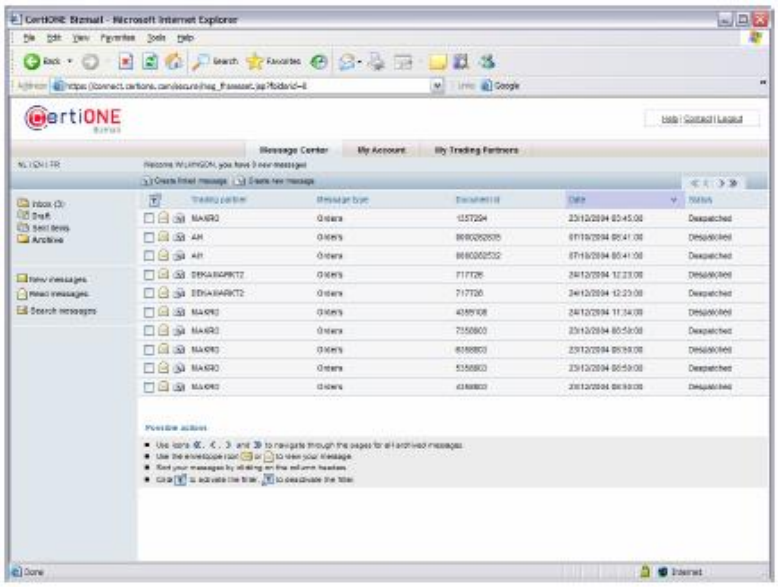


Illustration 9: Archive folder

A message in the archive folder can have one of the following statuses:

- ✓ ‘Despatched’: message for which a despatch advice has been created or sent;
- ✓ ‘Invoiced’: a message for which all message lines have been invoiced;
- ✓ ‘Confirmed’: a message for which all message lines have been confirmed (positively or negatively).

Incoming messages are stored in the archive folder for 60 days. After 60 days, all messages in the archive folder are deleted automatically and can’t be retrieved.

F. Working with your Basware mailbox

In this section you will find a step-by-step tour through the different procedures in your Basware mailbox, explaining all commands and functions.

1. Viewing and printing a message

In any folder you can view a message by clicking the envelope icon.

: a new message in the Inbox folder

: a previously read message in the Inbox and any other folder.

This will result in opening a new window which contains the message taskbar and the message contents.

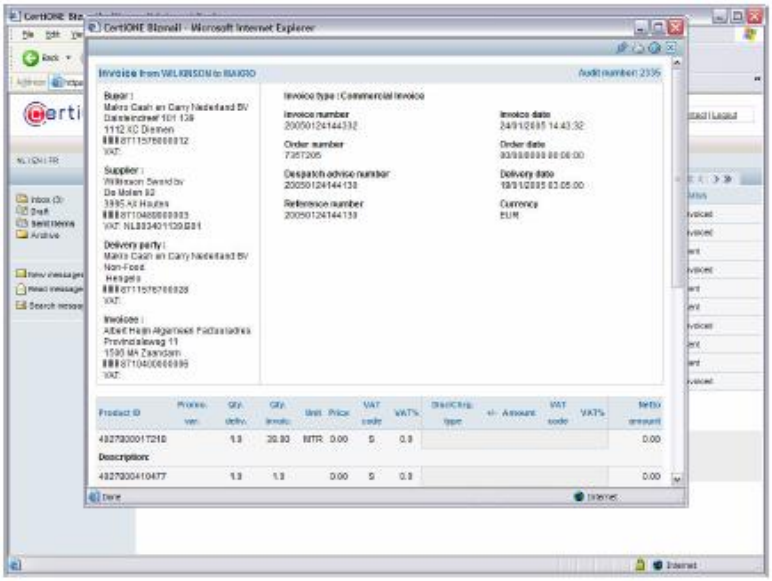


Illustration 10: Message view

The first time you read a new, unread message, an automatic receipt acknowledgement (Aperak) is sent to the sender.

You can also click the trading partner text or the message type text in the messages list, resulting in the same new window.

To print the message, click the print icon in the top right corner of the message view.

Illustration 11: Print message

2. Deleting a message

Messages can only be deleted through the Draft folder. Select the checkbox of one or more messages. Selected messages change background colour in the list. Then click the remove button ✕ in the taskbar.

Illustration 13: Confirm deletion

Notes:

1. The messages will be deleted permanently. You can not undo this action, deleting a message is irreversible.

2. The status of messages related to a deleted message will be updated. For instance, if you delete an invoice, the status of the related order will be changed from 'Invoiced' to 'Viewed'.

3. Messages in the archive folder are archived on the system and deleted from the archive folder automatically after 60 days.

3. Creating a linked message

A linked message is a message which is being linked to another message, for example a despatch advice linked to an order, an invoice linked to a despatch advice.

Select a message in the list and click the 'Create linked message' in the taskbar. A new message is created in the Draft folder. The type of the message depends on the original message it is linked to. A pop-up window opens the new message in order for you to review and edit the new linked message. Within the message center you will automatically be redirected to the draft folder.

4. Creating a new, empty message

A new, empty message is a message which is built from scratch and is not linked to any other message in the message center. It is a completely empty message with predefined fields that have to be filled before sending.

Click the 'Create new message' in the taskbar to create an empty message. Select a message type (to a trading partner) from the list of possible messages. Then click the 'Create' button.

Illustration 14: Create new empty message selection

A new message is created in the Draft folder and a pop-up window opens the new message in order for you to complete the new empty message. For example for an invoice you will need to complete the new message with several required fields like an supplier and buyer address (EAN), etc, and add product lines to the message.

5. New messages

Click the 'New messages' link found on the left below the folder navigation to display the list of new but unread messages - with the status 'New' - in the Inbox. When you read a new message for the first time, an automatic receipt acknowledgement is (once) sent to the sender.

6. Read messages

Click the ‘Read messages’ link found on the left below the folder navigation to display the list of viewed messages in the Inbox, with a status other than ‘New’.

7. Search messages

You can find particular messages by searching over all messages over all folders, using the following search form found on the left below the folder navigation.

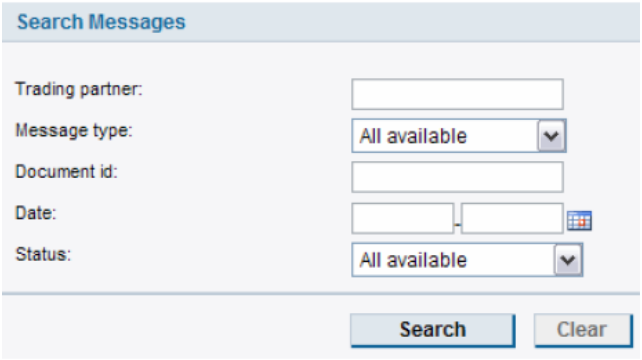


Illustration 15: Search form

The search form presents following options to search on:

- ✓ Trading partner: search for messages of a particular trading partner;
- ✓ Message type: search for a particular message type;
- ✓ Document id: search for a particular message on message id;
- ✓ Date: search messages between certain dates, using the date helper;
- ✓ Status: search messages set to a particular status.

You can search messages on any combination of search criteria you enter. Click the ‘Search’ button to submit your search request, click the ‘Clear’ button to clear the form of any values.

Note: to search on date, a date helper function is available. The date helper allows you to select a ‘from’ and ‘to’ date from a dropdown list, or pre-configured dates like ‘Today’, ‘Yesterday’, ‘This week’, ‘Last week’, ‘This month’, ‘Last month’, ‘Last year’, and ‘Last XX days’. Click ‘OK’ to apply your selection, or click ‘Clear’ to clear the date selection.

8. Creating a despatch advice

A despatch advice can be created in response to an incoming order in the Inbox folder. Select an order in the list and click the ‘Create linked message’ in the taskbar. A new despatch advice is created in the Draft folder. A pop-up window opens the new message in order for you to review and edit the new despatch advice.

9. Editing an outgoing despatch advice

By default, all information in a despatch advice is identical to the order it corresponds with. If however the delivery information on the despatch advice must differ from the delivery information on the order, you can modify the following information: despatch advice number, planned delivery date and, delivered quantities.
Please remember that some retailers do not allow split deliveries.

1. Go to the Draft folder where you find all despatch advices ready to be sent.

2. Select the despatch advice message you want to change, click the edit icon .

3. A new browser window will be opened with the selected message in edit-mode: data can be changed through input fields.

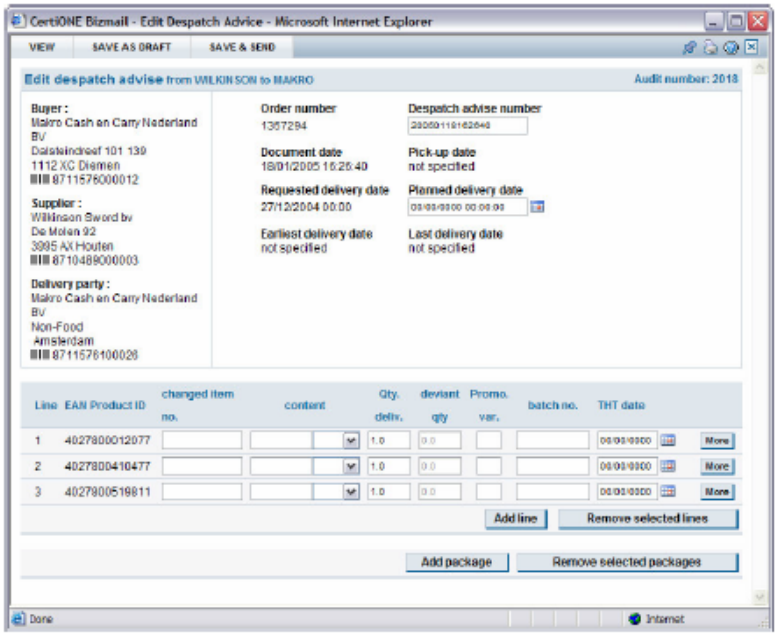


Illustration 16: Edit Despatch Advice

4. You can add a new line by clicking the ‘More’ button for a product, or a new empty product line by clicking the ‘Add line’ button, or if required, remove any new line by selecting the line and clicking ‘Remove Selected Lines’. You can add (and remove) one or more packages.

5. Save the changes by clicking ‘SAVE AS DRAFT’ in the message view taskbar, or if you want to send the message immediately, click ‘SAVE & SEND’.

6. Click the close button to close this window (Alt+F4).

10. Sending a despatch advice

Outgoing despatch advice messages in the Draft folder can be sent by clicking the send message icon next to the individual message, or by selecting the checkbox of one or more messages in the list and clicking the send selected icon in the taskbar above the list.

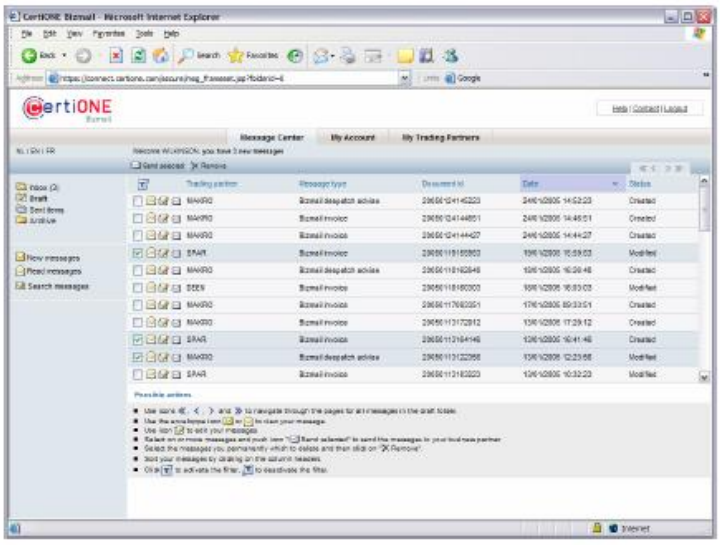


Illustration 17: Sending multiple, selected despatch advices

11. Creating an invoice

Invoices can be created in response to an order or to a despatch advice:

1. Select an order from the Inbox folder, or select a despatch advice from the Sent Items folder. If you select a despatch advice from the Sent Items folder, make sure it carries the status SENT. You can not create an invoice from a despatch advice in the Sent Items folder with the status SENT.

2. Click the 'Create linked message' link next to the message or in the taskbar above the list. A new message linked to the selected message, is created in the Draft folder, and the message view is opened. The main window is sent to the Draft folder with your newly created message at the top of the messages list.

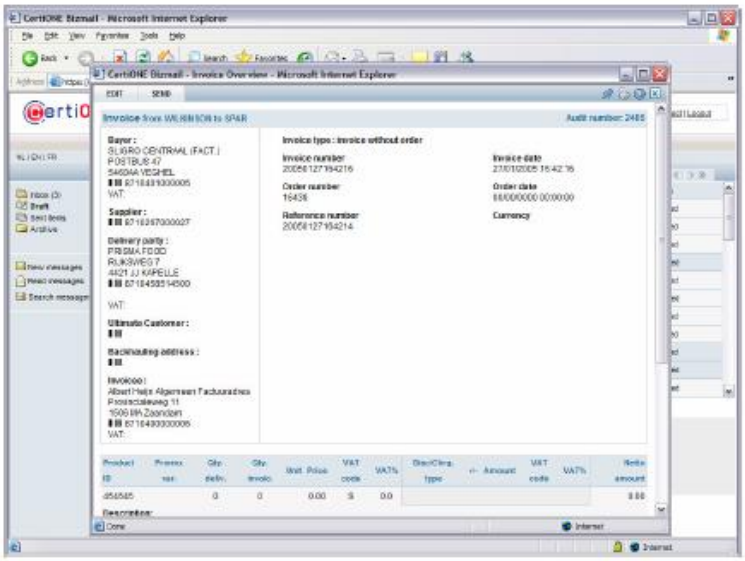


Illustration 18: Message view for new created invoice

12. Editing an outgoing invoice

By default, all information in an invoice is identical to the order or despatch advice it corresponds with. If however the invoice information on the invoice document must differ from the invoice information on the original order or despatch advice, you can modify the following information:

- ✓ Buyer, supplier, delivery party and invoicee EAN number and VAT number;
- ✓ Invoice number: the unique number of the invoice;
- ✓ Order number;
- ✓ Despatch advice number;
- ✓ Invoice date;
- ✓ Order date;
- ✓ Delivery date;
- ✓ Invoice currency;
- ✓ Product id;
- ✓ Promo var;
- ✓ Quantity delivered;
- ✓ Quantity invoiced;
- ✓ Unit: number of units ;
- ✓ Price: the unit price of product;
- ✓ VAT code;
- ✓ VAT rate
- ✓ Discount or charge type (i.e. charge for express delivery, etc.);
- ✓ Amount for discount or supplementary charge (the sign is determined by the type of discount or charge);
- ✓ Discount/charge VAT code;
- ✓ Discount/charge VAT rate;

To edit an invoice:

1. Go to the Draft folder where you find all invoices ready to be sent.
2. Open the invoice message you want to edit, click the edit icon next to the message.
3. A new browser window is opened with the selected message in edit-mode. Review and update any of the pre-filled invoice data. Click the ‘Add line’ button to add a product line to the message. Click the ‘More’ button to add a new line for a product. If required, you can remove any new line by selecting the line and clicking ‘Remove Selected Lines’. You will want to maximize the message view window to have the editable product line completely visible without horizontal scrolling.

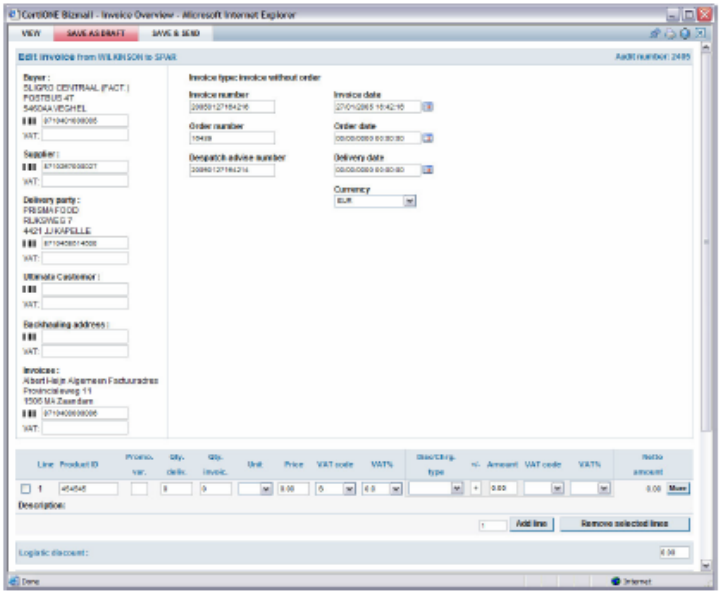


Illustration 19: Edit invoice

4. The moment you change any of the present data or add a new product line, you are reminded to save your changes in the message view taskbar when you are done.

Illustration 20: Save as draft reminder

5. Click the 'SAVE AS DRAFT' link in the message view taskbar to apply your changes (and send later on), or click 'SAVE & SEND' to apply your changes and send the message immediately.
6. Click the close button ☒ to close this window (Alt+F4).

13. Sending an invoice

Outgoing invoice messages in the Draft folder can be sent by any one of the following methods:

- ✓ click the send icon next to the individual message in the list;
- ✓ Send several messages at once by selecting the checkbox of one or more messages in the list and clicking the 'Send selected' icon in the taskbar above the list.

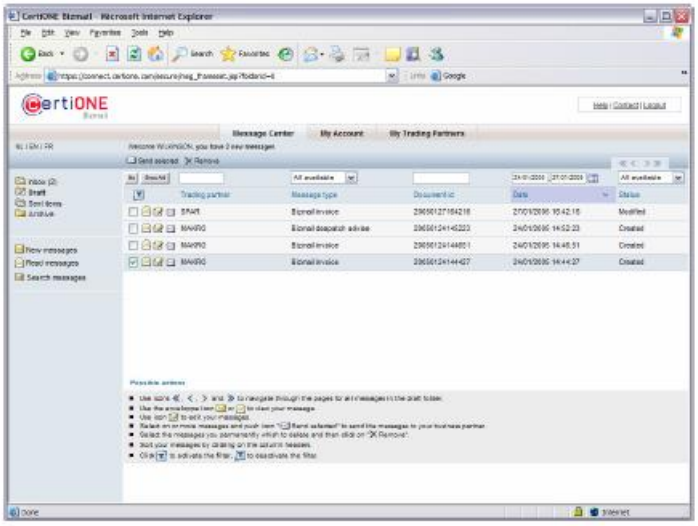


Illustration 21: A filtered list of invoice messages in the draft folder

- ✓ Open the message in message view through the view or edit icon. In the new pop-up window click ‘SEND’ (view mode) or ‘SAVE & SEND’ (edit mode) in the message view taskbar at the top of the message view window;

Illustration 22: Send invoice through the message view

III. Basware partner profile

A. My account

Click the ‘My Account’ in the main navigation tabs. The default page is the ‘My company profile’ page showing general information about the accountholder.

1. My company profile

The ‘My company profile’ page displays the following data, registered for the current accountholder:

- ✓ Company name;
- ✓ Name;
- ✓ Address;
- ✓ Postal Code;
- ✓ City;
- ✓ Country code;
- ✓ VAT number;
- ✓ Telephone number: contact telephone number, mandatory, editable;
- ✓ Fax number: contact fax number, editable;
- ✓ E-mail: contact e-mail address, mandatory;
- ✓ Language: mandatory, requires you to re-log on to apply the changes;
- ✓ Your Basware mailbox view: the default view used if your account supports multiple communities.

Click the ‘Save’ button to apply your changes.

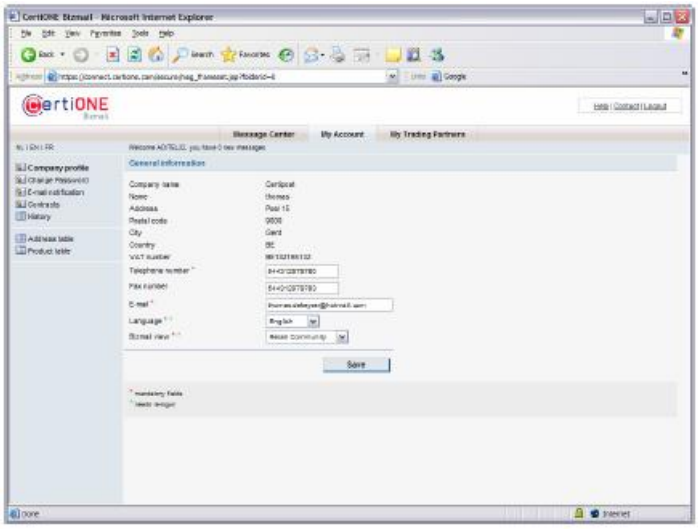


Illustration 23: My Account company profile screen

2. Change my password

Click the ‘Change my password’ link to change your current password used to log into your Basware account. Changing your password requires you to login again. Enter a new password, and confirm the new password. Click ‘Save’ to apply your changes. This will log you out of your Basware account.

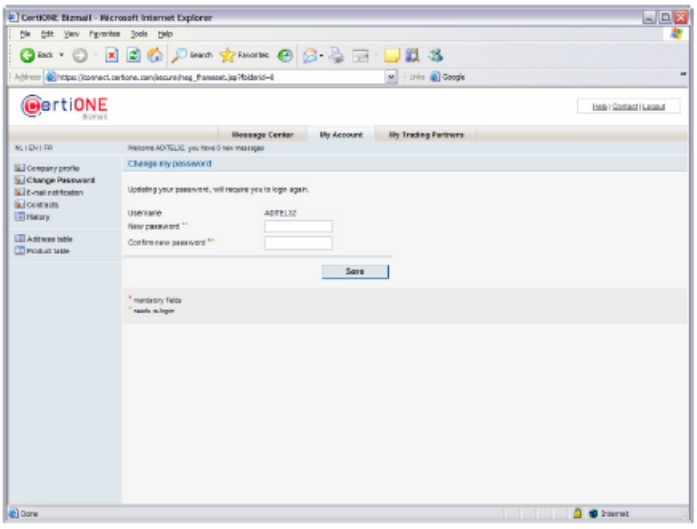


Illustration 24: Update Bizmail password

3. E-mail notification

E-mail notification addresses: add one or multiple, semi-colon (;) separated e-mail addresses to send a notification e-mail upon message reception.

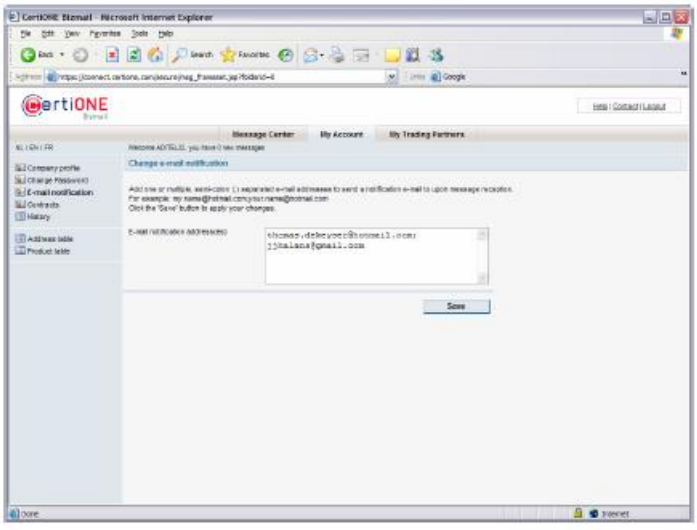


Illustration 25: Change e-mail notification

4. History

Click the ‘History’ link in the side menu. You can keep track of the volume of exchanged messages through the history page. First select a period for which to display the history, click ‘Go’.

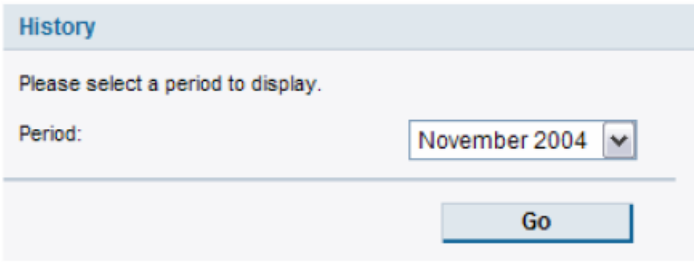


Illustration 26: Select history period

This displays a list of all messages for the particular period.

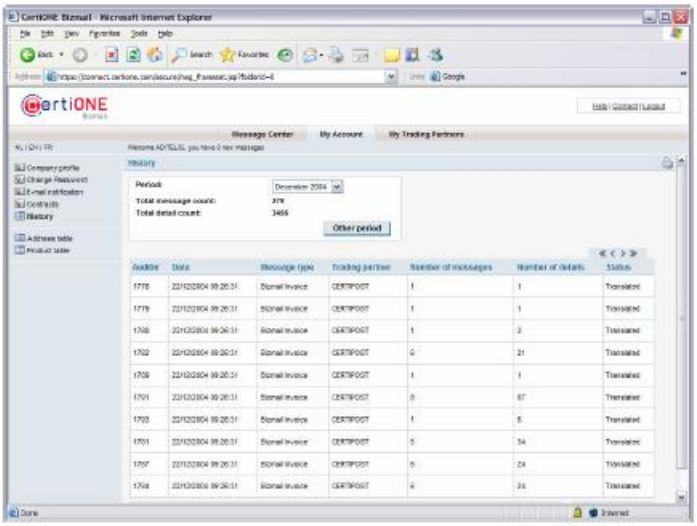


Illustration 27: History list

At the top you have an overview with the total message count and the total details count. You can select a new period and click the 'Other period' button to display a messages list for another period. Click the print icon in the top-right corner to print the current list of messages.

- ✓ The list contains the following columns:
- ✓ Audit number;
- ✓ Date;
- ✓ Message type;
- ✓ Trading Partner;
- ✓ Number of messages contained within the exchange (envelope);
- ✓ Number of details: in the message;
- ✓ Status: messages received, deleted, sent,…

5. Contracts

Click the 'Contracts' link in the side menu. The Contracts page allows you to enrol on other communities and/or services. Services are your Basware account and bizconnect. Communities are for instance Retail, Dynadro, Belgacom. The options available to you are dependant of what services/communities you are subscribed too. It is possible that some of the options displayed in this manual will not be available to you.

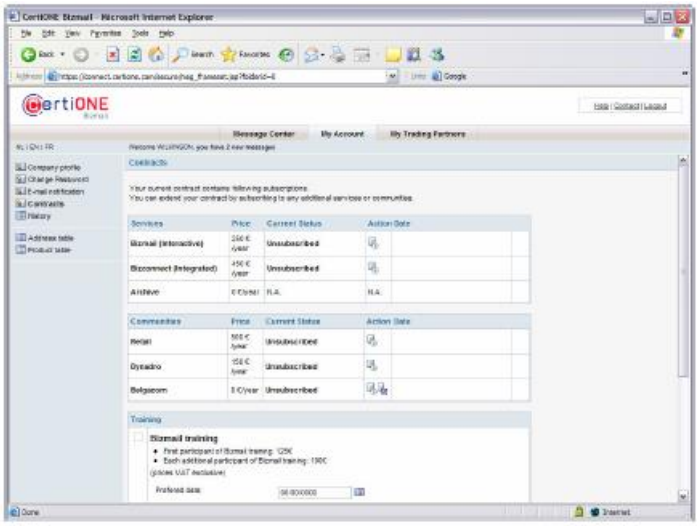


Illustration 28: Contracts

How to subscribe? Clicking the subscription button will change the current status from unsubscribed to pending. Once all configurations on the BaswareONE platform are done, the status will change to subscribed.

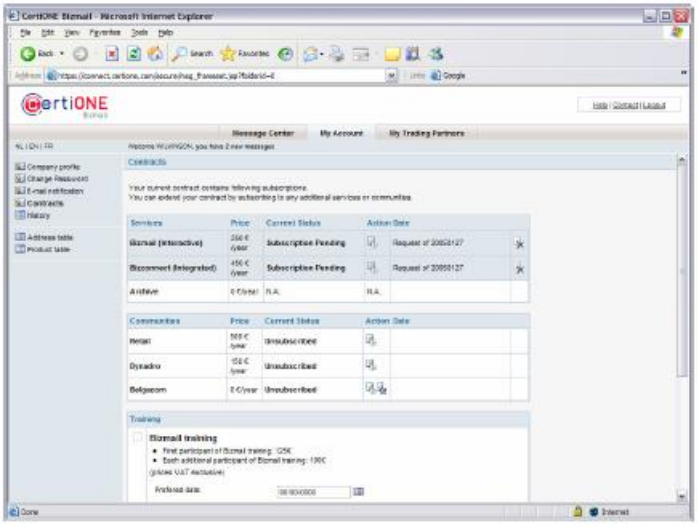


Illustration 29: Subscriptions pending

You can also subscribe to some options, such as a training your Basware account or a training bizconnect. In case you are subscribed to the Belgacom community you can also choose between some extra options which determine the network you will be using (Bizconnect, IPX400 or IE_VAN).

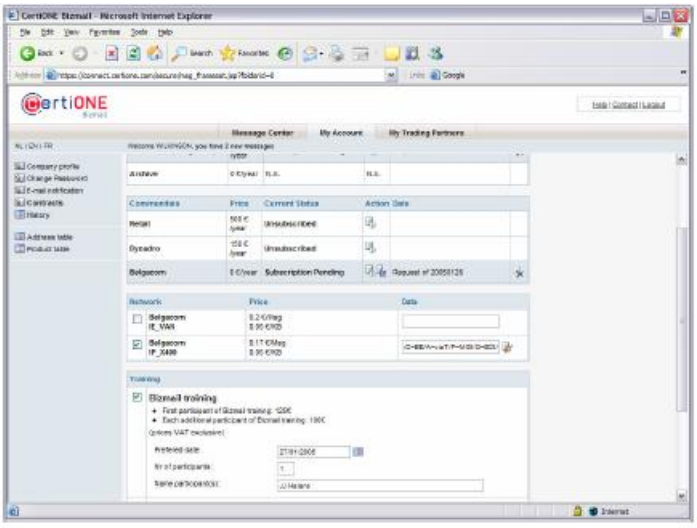


Illustration 30: Subscription options

Every option you subscribe to is mailed you in detail: description of your choices, the price and a total amount.

6. Address table

Click the ‘Address table’ link in the side menu. The address table allows you to keep track of your trading Partners’ addresses, identifying EAN numbers. Whenever you receive a message containing EAN numbers, these EAN identifiers can be mapped to a particular address to display in the message.

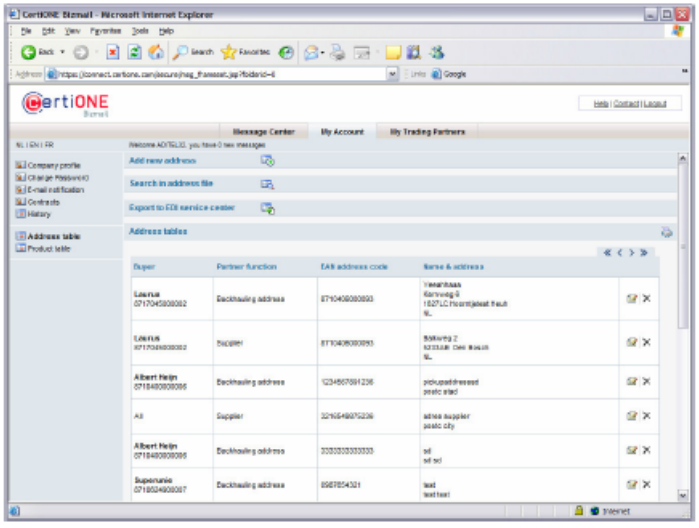


Illustration 31: Address table

The address list displays all your configured addresses in the following columns:

- ✓ Buyer;
- ✓ Partner function;
- ✓ EAN address code;
- ✓ Name and address.

Click the print icon at the top-right of the list to print the current displayed list.

Add new address

Click the ‘Add new address’ icon to add a new address to your address table. An address form appears.

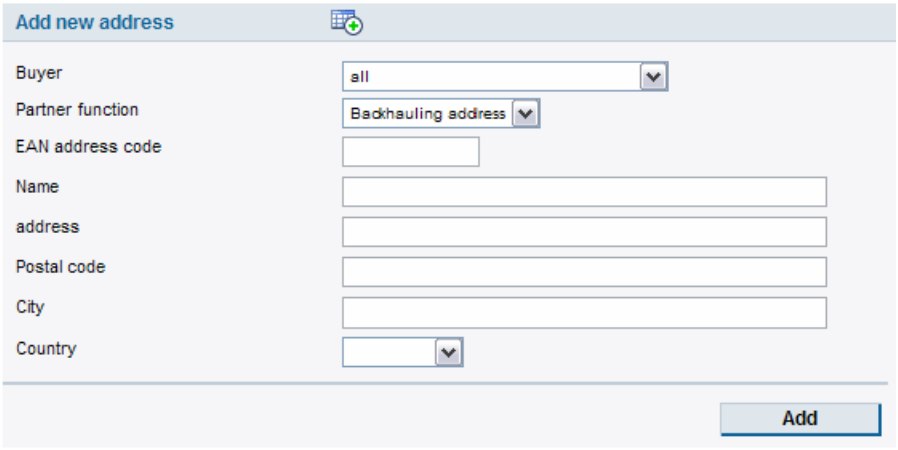


Illustration 32: Add new address

To add a new address:

- ✓ Select a buyer from the list, or if the address applies to all buyers, select ‘All’;
- ✓ Select a partner function: backhauling or supplier address;
- ✓ Enter an EAN Address code the address data applies to;
- ✓ Name;
- ✓ Address;
- ✓ Postal code;
- ✓ City;
- ✓ Select a country.

Click ‘Add’ to submit the address data. The address will now appear in the list.

Search in address file

Click the ‘Search address’ icon to search for an address in your address table. A search form appears.

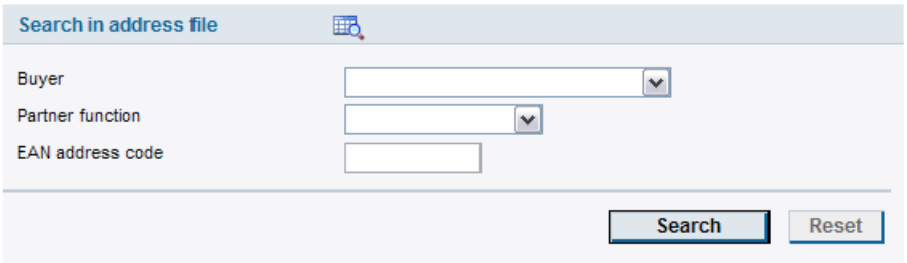


Illustration 33: Search address

You can search on a combination of any of the following search fields:

- ✓ Select a particular buyer from the list;
- ✓ Select a particular partner function;
- ✓ Provide a particular EAN address code.

Click ‘Search’ to apply your search criteria, or ‘Reset’ to reset the address list.

Export to EDI service centre

You can export your address table for EDI certification. First click the ‘Export’ button.

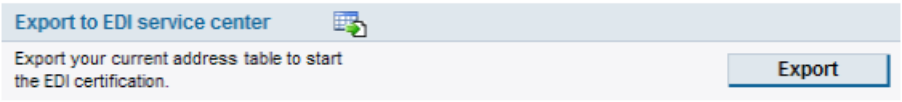


Illustration 34: Export addresses

Next select the addresses you want to export from the list and click the ‘Export’ button at the bottom of the list.

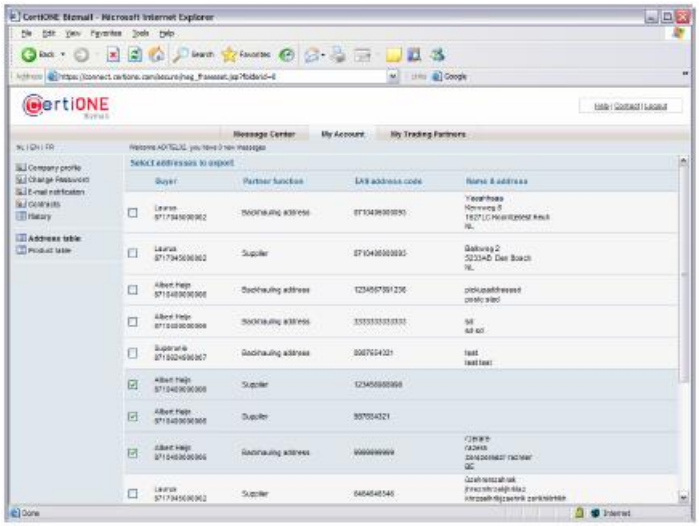


Illustration 35: Export addresses selection list

Edit/Delete address data

Click the edit button next to the address in the address list. This allows you to edit the current address data.

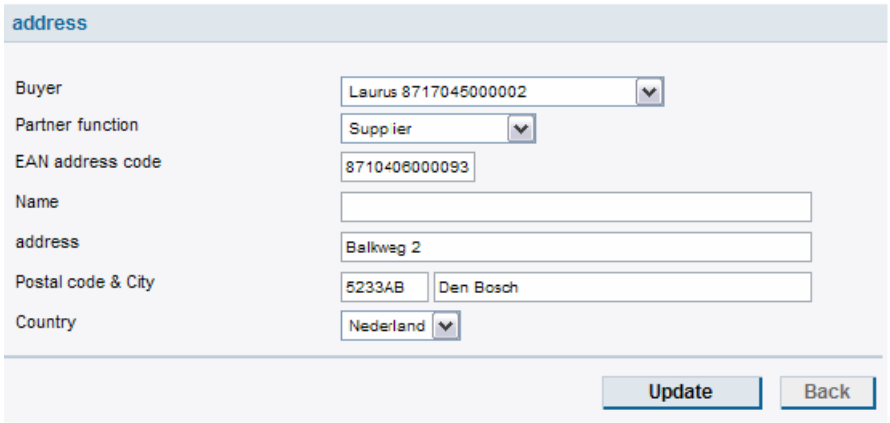


Illustration 36: Edit address data

The form displays the following fields for you to edit:

- ✓ Buyer list;

- ✓ Partner function list;
- ✓ EAN address code;
- ✓ Name;
- ✓ Address;
- ✓ Postal code and city;
- ✓ Country list.

Click ‘Update’ to apply your changes, or click ‘Back’ to return to the previous page.

To delete an address from the list, click the remove button next to the address in the address list.

7. Product table

Click the ‘Product table’ link in the side menu. The product table allows you to keep track of your products, identified by the EAN number. Whenever you receive a message containing EAN numbers, these EAN identifiers can be mapped to a particular product to display additional information in the message.

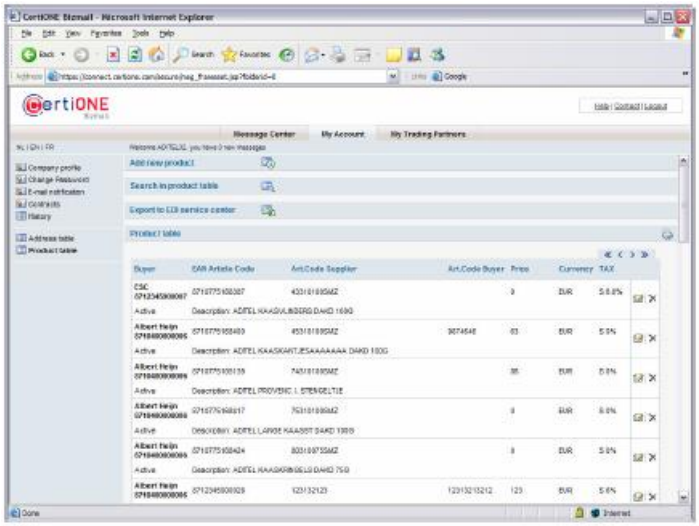


Illustration 37: Products table

Add new product

Click the ‘Add new address’ icon to add a new address to your address table. An address form appears.

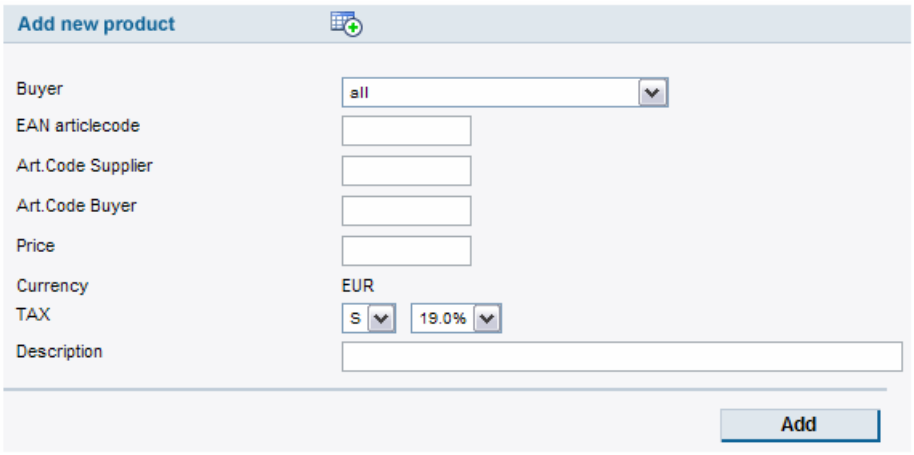


Illustration 38: New product form

- ✓ Select a buyer from the list;
- ✓ Enter an EAN article code;
- ✓ Supplier article code;
- ✓ Buyer article code;
- ✓ Price;
- ✓ Currency supported;
- ✓ Tax code and value;
- ✓ Description.

Click 'Add' to submit the product data. The product will now appear in the list.

Search in product table

Click the 'Search product' icon to search for an product in your product table. A search form appears.

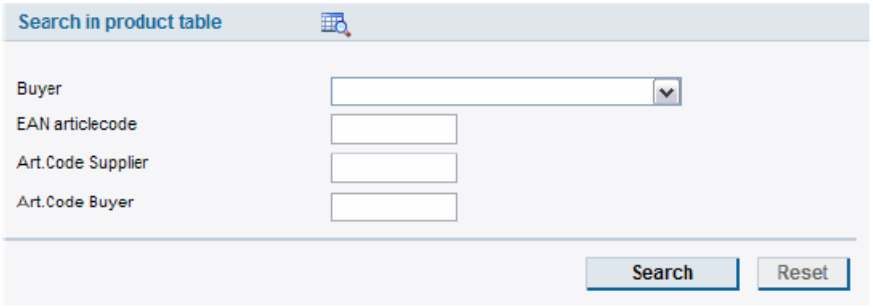


Illustration 39: Search product

You can search on a combination of any of the following search fields:

- ✓ Select a particular buyer from the list;
- ✓ Provide a particular EAN address code;
- ✓ A supplier article code;
- ✓ A buyer article code.

Click 'Search' to apply your search criteria, or 'Reset' to reset the product list.

Export to EDI service center

You can export your product table for EDI certification. Click the 'Export' button.

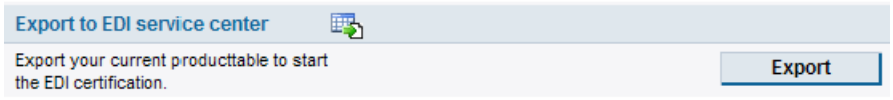


Illustration 40: Export products table

Edit/delete product list

Click the edit button next to the product in the product list. This allows you to edit the current product data.

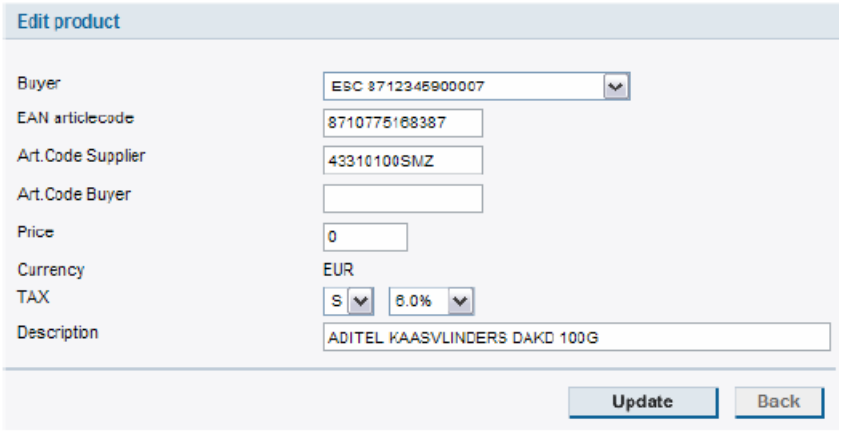


Illustration 41: Edit product

The form displays the following fields for you to edit:

- ✓ Buyer list;
- ✓ EAN article code;
- ✓ Supplier article code;
- ✓ Buyer article code;
- ✓ Price;
- ✓ Tax code and tax rate;
- ✓ Description.

Click ‘Update’ to apply your changes, or click ‘Back’ to return to the previous page.
To delete a product from the list, click the remove button next to the product in the product list.

IV. Your Basware trading partners

A. My Trading Partners

Click the ‘My Trading Partners’ in the main navigation tabs. The default page is the ‘My trading partners’ page showing your current Trading Partners and trading status (enabled, in ‘Test’ or ‘Production’).

1. My trading partners

The trading partners are grouped per community you are subscribed to. To view all trading partners from another community, select one from the dropdown list. The result is an alphabetical list. The list allows you to see all of your trading partners at one instance, with their configured messages types and channel, and the message’s status indicating if you are exchanging your messages through test (orange) or production (green) environment. The list also shows your subscription date.

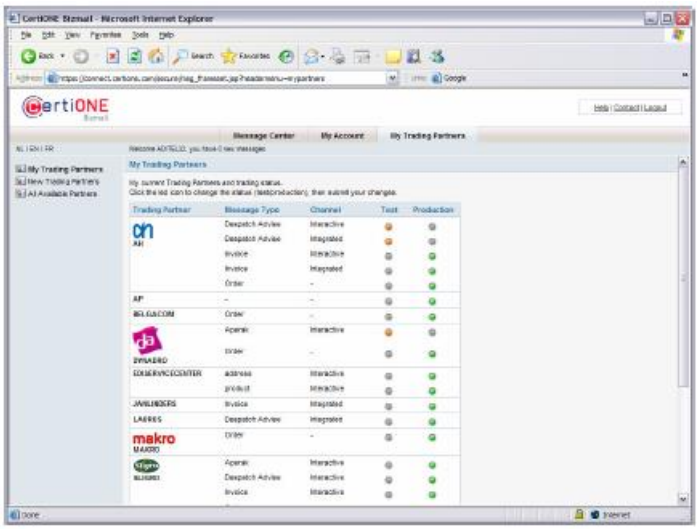


Illustration 42: My Trading Partners

You can change the message status by clicking the led for ‘Test’ or ‘Production’. After changing the status of one or more messages, click the ‘Save changes’ button at the end of the list to apply your changes.
If you want to unsubscribe a certain partner or one or more messages from a particular partner, you have to direct an e-mail to the Service Desk with your request. In order to swiftly process your request, please provide us with the following data:

- ✓ First name;
- ✓ Last name;
- ✓ Company name;
- ✓ Phone number;
- ✓ The partner(s) (optionally);
- ✓ The message type(s) per partner;
- ✓ Date;

The status will change from subscribed to unsubscribed.

As a consequence, you will not be able to view the unsubscribed messages in the list. The information will be available to you in ‘All available partners’ list.

2. New trading partner

Click the ‘New Trading Partner’ link in the side menu. This page allows you to propose yourself new trading partners not yet available on the system.

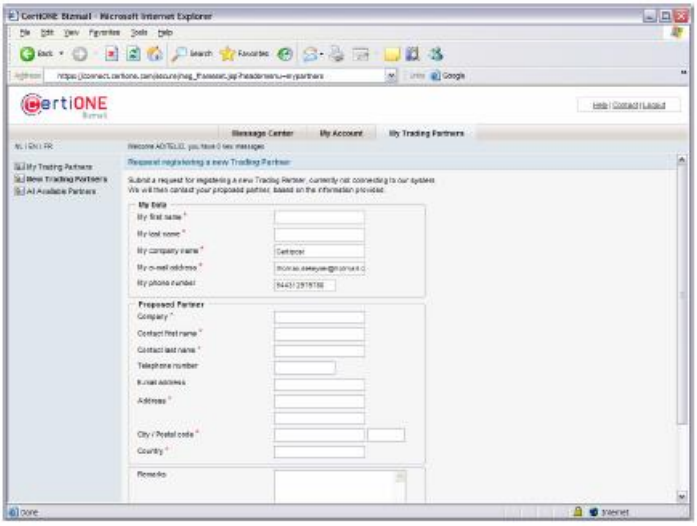
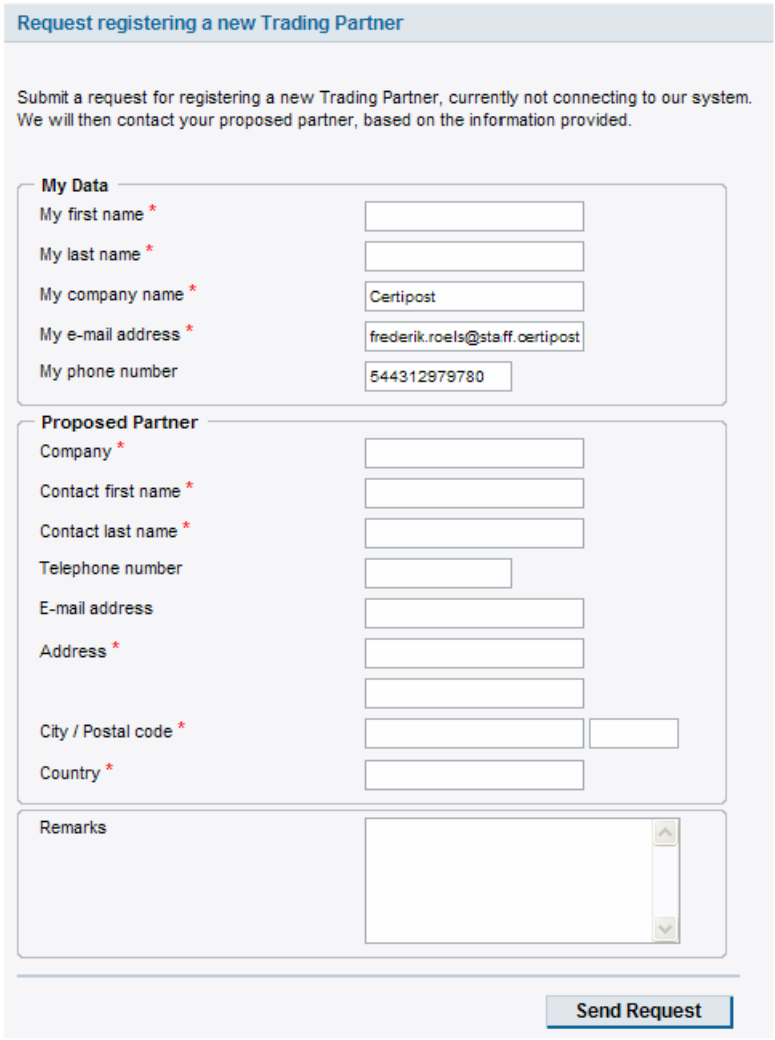


Illustration 43: Request registering new Trading Partner

Although many partners have signed up already for BaswareONE, you may use suppliers not yet connected. Here you can inform us of your contacts and we will get in touch with them and demonstrate the advantages of BaswareONE.



In order to swiftly process your request, please provide us with the following data:

Your contact data

- ✓ First name, required;
- ✓ Last name, required;
- ✓ Company name, required;
- ✓ E-mail address, required;
- ✓ Phone number.

The proposed partner data:

- ✓ Company, required;
- ✓ Contact first name, required;
- ✓ Contact last name, required;
- ✓ Telephone number;
- ✓ E-mail address, required;
- ✓ Address, required;
- ✓ Postal code and city, required;
- ✓ Country, required.

Add any remarks to your request.

Click ‘Send request’ to submit your request to the Customer Care service.

3. All available partners

Click the ‘All Available Partners’ link in the side menu. This page displays a list of all connected trading partners on BaswareONE for each community, the alias used, the full name and their EAN number. To view the connected trading partners of another community, select the community from the dropdown list.

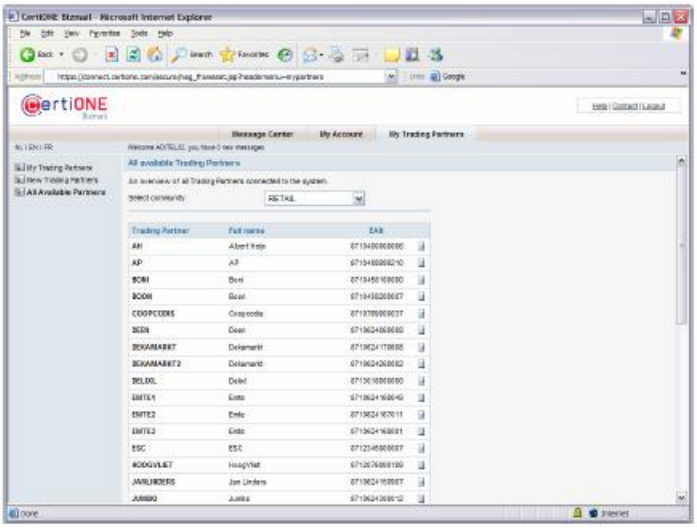


Illustration 45: All available partners

To view the supported messages, click the details link next to the EAN number.

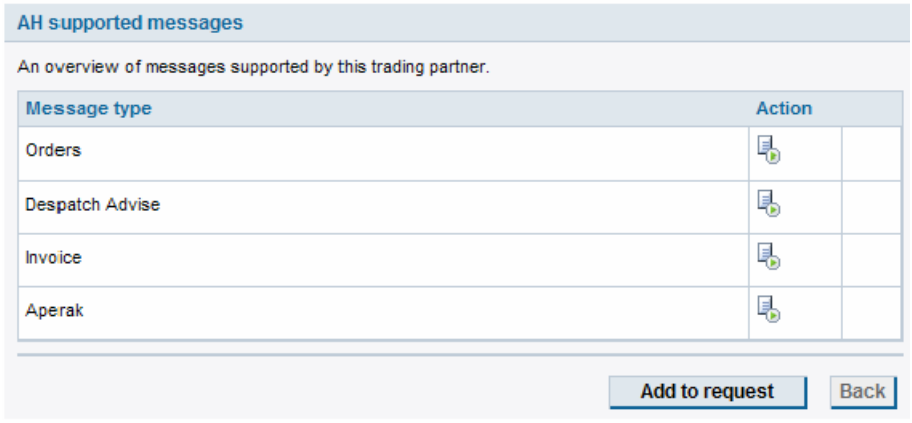


Illustration 46: Supported message types

The list of messages shows all possible messages for this trading partner and gives you the possibility to enroll yourself for this partner and one or more of his messages. Click the ‘Add to request’ button to add the selected messages to your request. Click the ‘Back’ button to return to the list of trading partners without adding any message types to your request.

You can remove the selected message type by clicking the remove button on the right side.

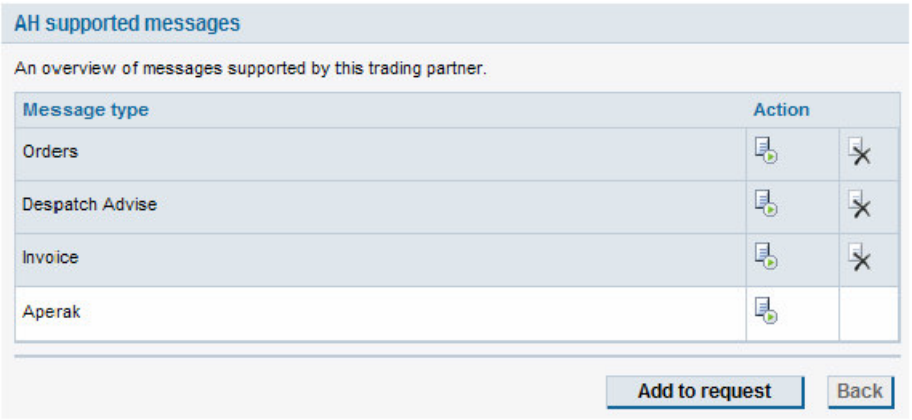


Illustration 47: Message type selection

The request overview shows you all selected message types for any trading partner. You can add more messag types from other trading partners by clicking the 'More' button, returning you to the trading partner list.

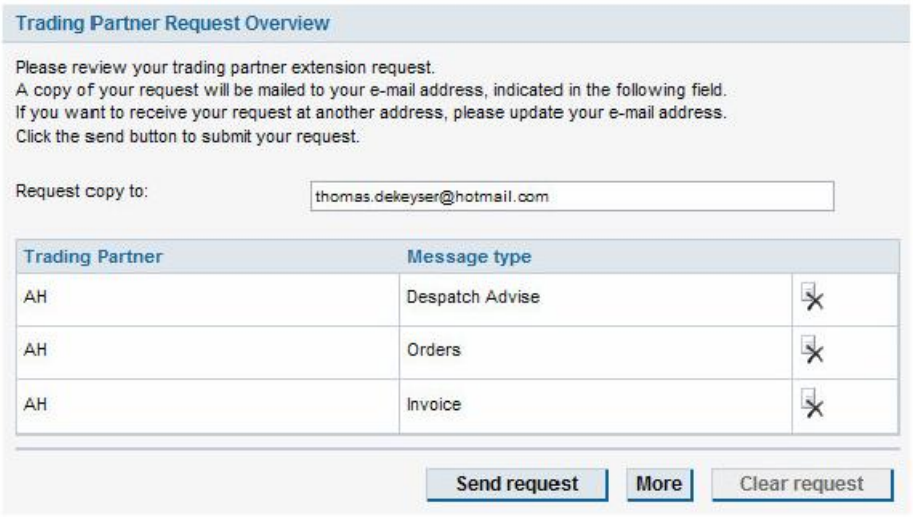


Illustration 48: Trading Partner request overview

A copy of your request will be mailed to you, to the address in the text field. If you want to receive your request at another address, you can change the e-mail address in the text field. Click the 'Send request' button to submit your request to the BaswareONE helpdesk for processing. You can remove individual message types by clicking the remove button on the right. To remove all message types, click the 'Clear' button.

Once you add message types to a request, you can access the request list also through the trading partner list using the 'Review request' button. It is also possible to clear your request by clicking the 'Clear Request' button.

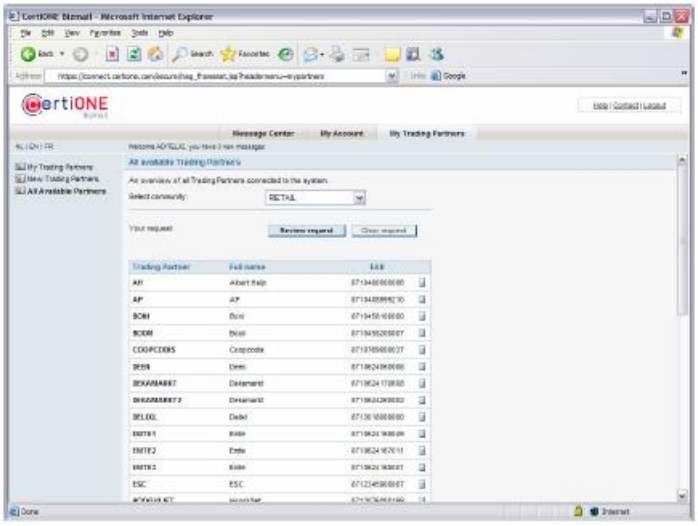


Illustration 49: All trading partners list with a request

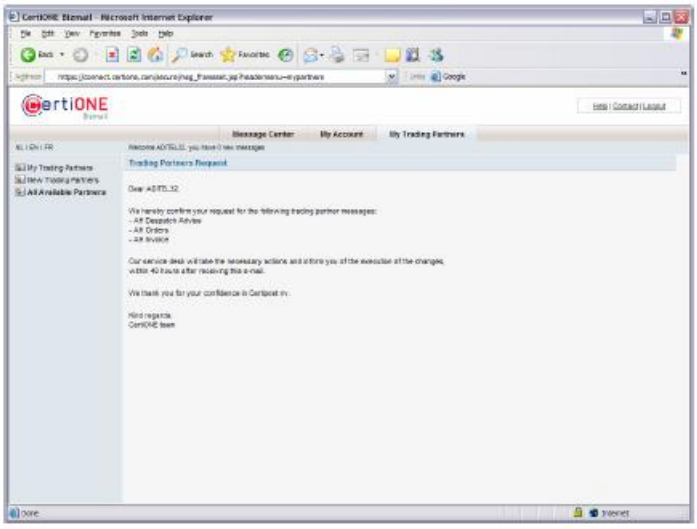


Illustration 50: Message type request submitted

Once BaswareONE is configured for you by the BaswareONE helpdesk, you will be able to view this partner and the selected messages in ‘My Trading Partners’.

V. Version & copyright information

This user guide is based on version 3.2 of your Basware account, released on January 2nd 2005. This is version 2.0 of the Bizmail user guide, published on January 2nd 2005. This PDF version replaces older HTML Help documents.

Basware's corporate website (http://www.basware.be) keeps you informed of Basware news and events. If you have any comments, questions, or other remarks about either Bizmail for CertONE itself, or the Bizmail documentation, contact the BaswareONE Service Center via ts.servicedesk.belgium@basware.com.

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