basware

Simplify Operations, Spend Smarter.

USER GUIDE
Basware SmartPDF (June 2022)

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1 Overview

Your customer expects you to send e-invoices. A quick and easy way to to meet their expectations is to use Basware SmartPDF service. Simply create a PDF invoice with your regular invoicing software and email it to your customer's Basware Service address. Basware SmartPDF reads the invoice data from the PDF invoice you have sent, creates an electronic invoice based on it, and delivers both the electronic invoice and the PDF invoice to your customer.

Getting started is simple. The only thing you require is an email address from which you can send invoices in PDF format. The service supports both machine-readable and image based PDF invoices, but Basware recommends you use machine-readable invoice files. Some customers may require that you register to the service. In this case, you need to go through a simple registration process and then confirm the email address from which you will send PDF invoices to the service.

This document tells you how to use the service and walks you through the registration process to Basware Network. If you have any problems with the registration process, please contact Basware Support.

2 Getting started

If your customer does not require you to register to the Basware SmartPDF, you can start sending PDF invoices right away.

If, however, your customer requires you to register to the service, you must:

- register the email address that you will use to send PDF invoices
- Sign up for a Basware Network account, if your customer has requested this.

Once you have completed these steps, you can send your first PDF invoice to the service.

2.1 Sign up for a Basware Network account and activate the service

Basware SmartPDF is a part of Basware Network. If your customer requires you to register to the service, you must sign up for a Basware Network account.

ℹ️ If you already have an account in Basware Network, you can simply activate Basware SmartPDF without having to sign up first when you receive an invitation to the service.

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1. Open the Basware SmartPDF service's landing page.
   - If you received an email invitation, follow the link in the invitation.
   - If you received an invitation letter, enter the web address in the invitation letter into your browser's address bar.

   ℹ️ The letters used in the web address are case-sensitive.
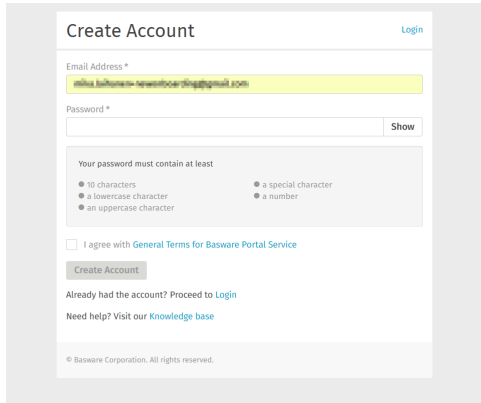

   The Basware SmartPDF service's landing page in Basware Network opens.
2. On the service landing page, click **Get Started**.

   The **Choose your e-invoicing service** page opens.

3. Select **Send Smart PDF invoices by email** and click **Let's start**.

   The **Create Account** page opens.

4. Choose a username and enter it in the **Email Address** field.

> ℹ️ The service selects the email address that your invitation was sent to as your username. If you want to use another email address as your username, enter that address in the **Email Address** field.

5. Choose a secure password and enter it in the **Password** field.

6. Read the **General Terms for Basware Portal service** and tick the checkbox to confirm that you agree to the terms.

7. Click **Create Account** to create a new Basware Network account.

   The service sends a confirmation message to your email address.

> ℹ️ It may take a while before the confirmation message is delivered to your email address. If you do not receive the confirmation message within an hour, contact Basware Support: https://basware.service-now.com/bw?id=bw_sc_cat_item_public.

8. Open the confirmation message and click **Confirm Your Email** to activate your account.
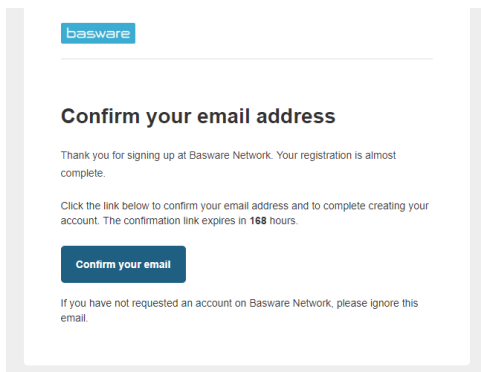
The login page opens and you'll see a confirmation message telling you that your account has been activated.

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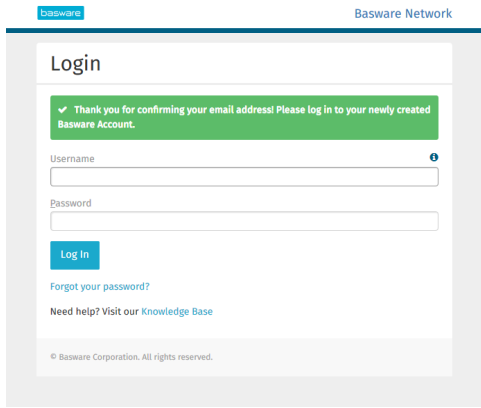
i If you get a message that says your confirmation link has expired, you must start the registration process over. To do this, open the link in the invitation you received and sign up to the service again.

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9. Enter your **Username** and **Password**, and click **Log in**.

   The SmartPDF service pages open.

10. In the **Basic details** section, fill in your company's details.

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i Enter your company's Sales Tax number, VAT identification number, email address or a similar unique identifier in the **Business Identifiers** field. If you get a notification that your organization's identifier is already in use in the service, contact Basware Support for assistance: https://basware.service-now.com/bw?id=bw_sc_cat_item_public.

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11. In the **Primary contact** section, enter the details of the person, who will be your company's primary contact towards Basware.

12. Click **Next**.

13. In the **Service settings** section, set your service preferences.

    Click **Add new email address** to add all the email addresses from which you will send PDF e-Invoices. You must confirm each of the email addresses that you add to the service by opening the confirmation link sent to the address.

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i You can only send invoices from the addresses that you define here. Invoices sent from other addresses will not be delivered to the recipients.

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14. Click **Next**.

15. In the **Instructions** section, review your customer's e-invoicing instructions.

16. Click **Complete** to complete the onboarding process and activate the service.

    Once the service has been activated, you will be redirected to the **Documents** page in **Basware Network**.

17. Click **Close** to open the Basware Network home page.
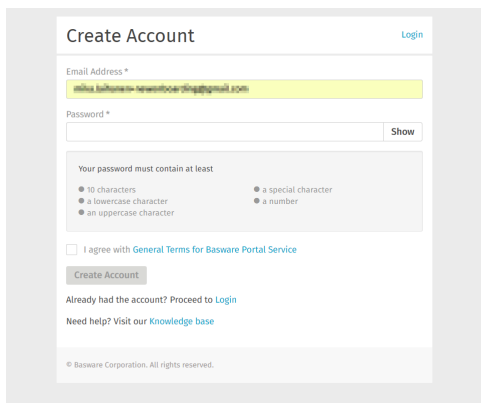

2.2 Activate Basware SmartPDF

If you already have an account in Basware Network, you can activate Basware SmartPDF without having to sign up to the service first.

1. Open the Basware SmartPDF service's landing page.
    - If you received an email invitation, follow the link in the invitation.
    - If you received an invitation letter, enter the web address in the invitation letter into your browser's address bar.

    > The letters used in the web address are case-sensitive.

    The Basware SmartPDF service's landing page in Basware Network opens.

2. On the service landing page, click **Get Started**.

    The **Choose your e-invoicing service** page opens.

3. Select **Send Smart PDF invoices by email** and click **Let's start**.

    The **Create Account** page opens.

Create Account	Login

    Email Address *

    Password *   Show

    Your password must contain at least
    - 10 characters   • a special character
    - a lowercase character   • a number
    - an uppercase character

    ☐ I agree with General Terms for Basware Portal Service

    Create Account

    Already had the account? Proceed to Login

    Need help? Visit our Knowledge base

    © Basware Corporation. All rights reserved.

4. Click **Log in**.

    The SmartPDF service pages open.

5. In the **Company Details** section, make sure your company details are correct and that no information is missing.

6. Click **Next**.

7. In the **Service settings** section, set your service preferences.

    Click **Add new email address** to add all the email addresses from which you will send PDF e-Invoices. You must confirm each of the email addresses that you add to the service by opening the confirmation link sent to the address.

    > You can only send invoices from the addresses that you define here. Invoices sent from other addresses will not be delivered to the recipients.

8. Click **Next**.

9. In the **Instructions** section, review your customer's e-invoicing instructions.

10. Click **Complete** to complete the onboarding process and activate the service.

   Once the service has been activated, you will be redirected to the **Documents** page in **Basware Network**.

11. Click **Close** to open the Basware Network home page.

2.3 View, register and unregister email addresses

You can view, register and unregister email addresses on the Basware SmartPDF service page.

2.3.1 View email addresses

1. Log into Basware Network.
2. On the top navigation bar, click **Services**.
3. Under **Sending Invoices**, click **Smart PDF e-Invoice**.
4. Click **Email Addresses for invoicing** to expand the section.

   Your current, registered email addresses are listed under **Email Addresses for invoicing**.

2.3.2 Register email addresses

1. Log into Basware Network.
2. On the top navigation bar, click **Services**.
3. Under **Sending Invoices**, click **Smart PDF e-Invoice**.
4. Click **Email Addresses for invoicing** to expand the section.

   Your current, registered email addresses are listed under **Email Addresses for invoicing**.
5. Click **+**.
6. In the **Email** field, enter a new email address.
7. Click **Save**

   The service sends a confirmation message to the email address that you provided.
8. Open the confirmation message in your email client.
9. Click **Confirm**.

   You can now send PDF e-Invoices to the service from the new email address.

2.3.3 Unregister email addresses

1. Log into Basware Network.
2. On the top navigation bar, click **Services**.
3. Under **Sending Invoices**, click **Smart PDF e-Invoice**.
4. Click **Email Addresses for invoicing** to expand the section.

   Your current, registered email addresses are listed under **Email Addresses for invoicing**.

5. Click **Email Addresses for invoicing** to expand the section.

    Your current, registered email addresses are listed under **Email Addresses for invoicing**. Click ⊞ to register a new email address or click 🗑 next to an email address to unregister that email address.

6. Click 🗑 next to an email address that you want to unregister from the service.

2.4 Create a PDF invoice

There are many ways you can create a PDF invoice:

-   You can use your current accounting software, if it allows you to export invoices in PDF format
-   You can use a word processing or spreadsheet software - for example, tools from the Microsoft Office or the Apple iWorks suite - if the software allows you to save documents in PDF format.

If your current software can save documents in PDF format, you can use it to generate PDF invoices. If your current software does not allow you to create PDF documents, you can convert the invoice into PDF format using a PDF conversion software. For more information, see List of free PDF tools.

When you create PDF invoices:

-   Make sure the invoice meets the compliance requirements
-   Make sure the invoice meets the service's requirements
-   Make sure the invoice contains the invoice data in machine-readable or image-based PDF format.

2.4.1 Make sure the invoice meets your customer's requirements

Your customer requires that the invoices you send into Basware SmartPDF service contain pre-defined invoice fields. If any of these fields are missing from the invoice, Basware will populate the fields with default values.

In addition to the pre-defined fields, your customers may require that you include additional details on the invoice. They may require, for example, that you include your vendor number and a purchase order number. You must include all the information that your customers require on the invoice.

To view your customer's requirements:

1. In Basware Network, click **Network**.
2. Click **Customers** to open the **Customers** tab.
3. Use the search to find your customer.
4. Click ❯ next to the customer company's name to open the company details.
5. Download your customer's supplier information kit to view their invoicing requirements.

2.4.2 Make sure the invoice meets the compliance requirements

Different countries have different legal requirements for the contents of an invoice. Based on those requirements, certain invoice fields are set as mandatory in the Basware SmartPDF service. If any of the mandatory fields are missing from an invoice you send, Basware will populate the fields with default

values. The validation only covers a certain number of fields in each country. Therefore it is your responsibility to make sure that the content of the invoices that you send comply with local rules and regulations.

You can review the country compliance requirements in <u>Invoice content for different countries</u>.

2.4.3 Make sure the invoice meets the service's requirements

Each PDF invoice that you send to Basware SmartPDF must:

- use PDF version 1.4 or later
- contain the invoice data in machine-readable or image-based PDF format.
- be written in a supported language. Basware SmartPDF currently supports the following languages: Czech, Danish, Dutch, English, Estonian, Finnish, French, German, Hungarian, Italian, Lithuanian, Polish, Portuguese, Romanian, Spanish, Swedish, Norwegian.

3 Managing invoices

This section describes how you can send invoices and view the status of the invoices you have sent out.

3.1 Find your customer's supplier kit

Your customer's supplier kit is a set of documents that commonly contains:

- a list of the customer's organizational units and their e-invoicing addresses
- the customer's requirements regarding invoice content
- on applicable markets, a mapping table for the most common e-invoice formats in that market

1. Log into Basware Network.
2. On the top navigation bar, click **Network**.
3. Click **Customers** to open the **Customers** tab.
4. Use the search to find your customer.
5. Click ❯ next to the customer company's name to open the company details.
6. Download your customer's supplier information kit to view their invoicing requirements.

3.2 Find your customers' e-invoice addresses

You can only send PDF invoices to PDF invoice addresses that your customer as specified in the service. You can find your customer's PDF invoice addresses on their company profile page.

1. In Basware Network, click **Network** > **Business Directory**.
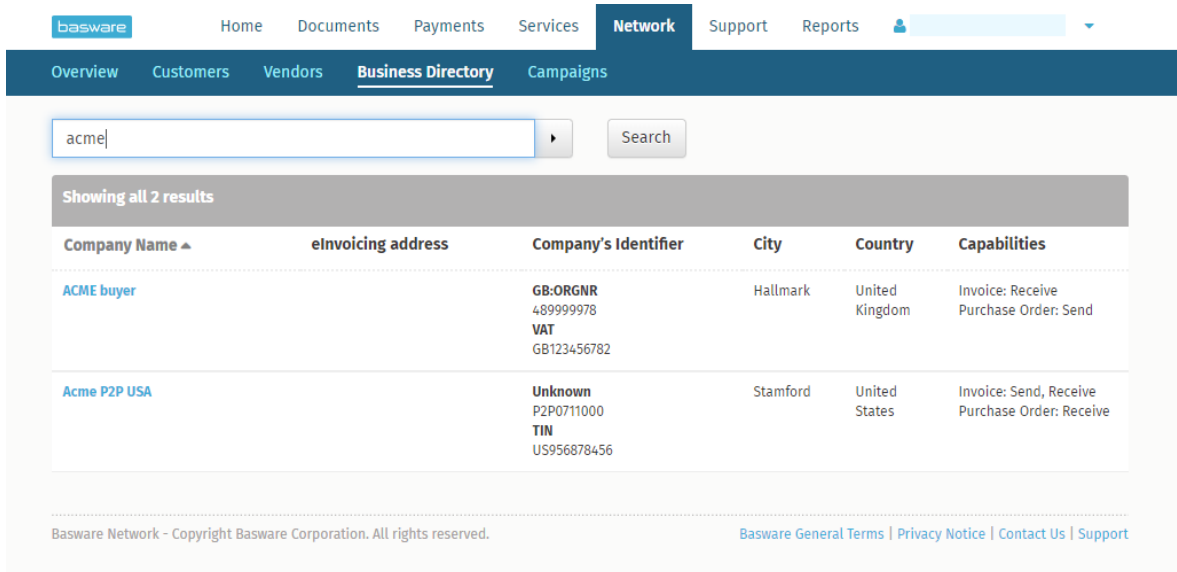2. Enter your customer's name in the **Search** field and click **Search**.

Figure 1: Search customers in the Business Directory page

The customers that match your search will be displayed in the Search results table

3. Find your customer's e-invoice address in the **eInvoicing Address** column and write it down.

4. Add the e-invoice address to the PDF e-invoices that you send to your customer.

3.3 Send a PDF e-invoice

Before you send an invoice:

- Make sure the invoice meets your customer's requirements
- Make sure that you are sending the invoice from a registered email address.

1. Using your standard email client, create a new email message.

2. Attach the PDF invoice you have saved on your computer to the email message.

   You can attach more than one PDF invoices in one email, if each invoice is addressed to the same customer.

3. Type the Basware service address in the **To** field.

   CustomerName_BusinessUnit@pdf.basware.com

4. Send the email.

   Basware delivers both an e-invoice data file and the PDF invoice to your customer.

   > Basware will notify you by email if the invoice cannot be delivered.
   >
   > The expected average delivery time for the invoice is one business day. Do not send the same invoice again to the service.

3.4 View invoice statuses

You can follow up invoices that you have sent with Basware e-invoice sending services on the Basware Network website.

When you log in to Basware Network, you see a list of invoices that you have sent to your customers. You can check the status of each invoice on this view. If you are looking for a specific invoice, you can use search to limit the number of search results.

1. Open the Documents page in Basware Network.

   The URL of the page is `https://portal.basware.com/documents`.

2. Enter the invoice number in the **Search** field.

   | Enter a document number | ▸ | Search |

3. Click **Search**.

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

Figure 2: Search Results table

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

Figure 3: Sort by labels

5. To view an invoice, click the title of the invoice in the **Search Results** table.

4 List of free PDF tools

i This following list of tools is provided as example only, and solely for informational purposes. It is not meant to function as an endorsement for the products that the companies in question provide. Basware Corporation has no control over the development and distribution of any of the software products listed herein. Therefore, Basware Corporation assumes no responsibility or liability for any incidental or consequential damages caused by your installing and using any of the software products listed herein.

It is likely that you can create machine-readable PDF invoices with your current software. If, however, you are unable to create PDF invoices, there are several free PDF tools available online that you can use to produce PDF invoices:

CutePDF™ Writer

Developer	Acro Software
Operating System	Microsoft®[1] Windows
Website	www.cutepdf.com

doPDF

Developer	Softland
Operating System	Microsoft Windows
Website	www.dopdf.com

Microsoft Office Add-in: Microsoft Save as PDF

Developer	Microsoft
Operating System	Microsoft Windows
Website	www.microsoft.com

PDFConverter Desktop

Developer	Baltsoft Software
Operating System	Microsoft Windows
Website	www.freepdfconvert.com

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[1] Microsoft® is a registered trademark of Microsoft Corporation in the United States and/or other countries.

5 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.