



Quick Guide for Users

Basware Portal for Receiving (March 2019)

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1 Introduction to Basware Portal for Receiving

Basware Portal for Receiving is a service that enables you to send electronic invoices to almost every invoice recipient. The only requirement is that the recipient has an active email address.

By default, Basware sends the invoice to the recipient by email as a PDF attachment. The email also contains a secure, one-time link that the recipient can use to register to Basware Network. Once the recipient registers to Basware Network and logs into the service, they can immediately see the first invoice in the service.

If the recipient has an account in Basware Network, they can select if they want to receive invoices online in Basware Portal or by email. They can change the delivery method any time. In the Basware Portal, the recipients can also follow up on their business documents' statuses in Basware Network and pull reports.

2 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 users](#)
- [Add new users to your organization](#)
- [Upload your company's logo](#)

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



If your company is made up of a single organization, you will be taken directly to the **My Organization** page without you having to click on the name of an organization.

If your company is made up of multiple organizations, each child organization will be displayed on this page in alphabetical order.

-
3. Click **Edit**.
The edit view opens.
 4. Make the necessary changes to your company's information.
 5. Click **Save Changes** to save the changes you made, or click **Cancel** to discard them.

2.2 Managing users

You can [view and browse users](#) from your company and from any organization hierarchically below your company.

If you have Company Administrator user rights, you can [add users](#) to your company and to its child organizations.

2.2.1 Find a user

You can find users from your company and any subsidiary organizations through the **My Organization** page.



1. On the top-right corner, click **[Your Username] > My Organization**.
2. Click on the name of the organization, whose users you want to view.



If your company is made up of a single organization, you will be taken directly to the **My Organization** page without you having to click on the name of an organization.

If your company is made up of multiple organizations, each child organization will be 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 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 the user's information, click on their username in the **Search Results** table.

2.2.2 Add a user to your organization

Company administrator users can add users to your 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 top-right corner, click **[Your Username] > My Organization**.
2. Click on the name of the organization, to which you want to add a new user.



If your company is made up of a single organization, you will be taken directly to the **My Organization** page without you having to click on the name of an organization.

If your company is made up of multiple organizations, each child organization will be 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 set the user role:

- **End user:** end users can see and work with the business documents that your company has sent.
- **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** to create a new user, or **Cancel** to cancel the operation.

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've activated their account and set a strong password.

2.3 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 will be shown, for example, on the email messages to which your PDF e-invoices will be attached.



1. On the top-right corner, click **[Your Username] > My Organization**.
The **My Organization** page opens.
2. Click **Edit**.
The **Edit Organization** view opens.
3. Click **Upload** and select the image file.



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

Once the image has been successfully uploaded, it will be displayed under **Organization's Logo** label.

4. Click **Save Changes** to save the new logo, or **Cancel** to cancel the operation.

3 Working with Invoices

Business documents are documents that your company uses to interact with other companies. Common business documents include, for example, **invoices**, and **credit notes**. With Basware Network, you can:

- [View invoice statuses](#)
- [Find a document using advanced search](#)

3.1 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
Delivery in Progress	Business documents that are currently being delivered to the recipient appear in Delivery in Progress status
Delivered to Recipient	Business documents that have been delivered to the intended recipient appear in Delivered to Recipient status
Received	Business documents that the recipient has opened appear in Received status
Rejected during Delivery	Business documents that have been rejected during the delivery process appear in Rejected in Delivery status Usually, this means that Basware Network has forwarded your document to your business partners e-invoicing operator, but their system has rejected the document. If your document gets rejected, make sure that contents of the document are valid, and try sending the document again. If the problem persists, contact Basware Support .
Error in Delivery	Business documents that Basware Network could not deliver to the intended recipient appear in Error in Delivery status 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 .

3.2 Find and view business documents

3.2.1 View invoice statuses

When you log in to [Basware Network](#), you'll 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. Enter in the **Search** field.

2. Click **Search**.

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

Showing 50 results (Scroll down for more)		Date Range: 07.01.2010 - ...
Last Updated	Status	Information (Sort by: Invoice Date Due Date)
7/27/2013 7:07:51 AM	Delivery in Progress	Invoice A00095000 - Acme Inc. - Generic Corp. Invoice Date 6/21/12 Due Date 7/21/12 Total 80.00 USD
7/25/2013 8:12:51 PM	Delivery in Progress	Invoice A00095679 - Acme Inc. - Generic Corp. Invoice Date 6/21/12 Due Date 7/21/12 Total 80.00 USD

Figure 1: Search Results table

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

Figure 2: Sort by labels

4. To view , click the title of in the **Search Results** table.

3.2.2 Find a document using advanced search



When you log into [Basware Network](#), you'll see a list of business documents that you've 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 search results by document details, add the filters you want to use:

- a. Click to open the **Advanced Search** panel.

Advanced Search ✕

Sender :

Recipient :

Last Updated -

Invoice Date -

Due Date -

Gross Total -

Buyer Reference :

Creation Date -

[Clear Form](#)

Figure 3: Advanced Search panel

b. Enter the filters that you want to use:

- **Sender:** Show documents from a specific sender.
- **Recipient:** Show documents 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 on the **Sort** labels:

(Sort by: **Invoice Date** ▼ **Due Date** ⇅)

Figure 4: Sort by labels

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

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

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

3.3 Create and download reports


3.3.1 Create a report



Only companies that have the Basware Business Document Reporting service activated can create and download reports in Basware Network.

You can create reports about business document that match certain criteria on the **Documents** page. You can both download these reports and have them emailed to you at certain intervals.



1. In the top menu bar, click **Documents**.
2. Click  to open the **Advanced Search** panel.
3. Enter the filters that you want to use:
 - **Sender:** Show documents from a specific sender.
 - **Recipient:** Show documents 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 generate a report that matches the search results, click **Export > Export results as CSV**.

Once Basware Network has generated the report, you can [download it on the Reports page](#).
6. Click **Close** to close the report generation dialog.

3.3.2 Download a report



Only companies that have the Basware Business Document Reporting service activated can create and download reports in Basware Network.

On the **Reports** page, you can download reports that you have [created](#).



1. In the top menu bar, click **Reports**.
2. The **Reports** table shows every report that you have created.

Table 2: Columns of the Reports table

Column name	Explanation
Requested time	The date and time when the export request was made.
Status	The status of the report. Possible values: Scheduled, Processing, Completed, Error
Information	Summary of the search query that was used to produce the report.
Actions	Actions available to the user. The Download report becomes active when the report is completed.

3. Click **Download report** on the row of the report that you want to download.
4. Save the report on your computer.

4 Managing Your Network

On the **Network** page, you can manage information related to your buyers and suppliers and share information with your business partners. You can access the functionalities of the **Network** page by opening the different tabs:



Depending on which Basware services you use, you may be both a customer and a vendor at the same time.

Overview On the **Overview** tab, you can see an overview of your customers and vendors. You can see, for example, how many of your customers or vendors can send or receive invoices, how many of them have recently updated their company profile, and which Basware services your 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 Partner List Template and import their details using the import tool.

- **Overview**
 - On the **Overview** tab, you can see an overview of your customers and vendors. You can see, for example, how many of your customers or vendors can send or receive invoices, how many of them have recently updated their company profile, and which Basware services your 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 Partner 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. If you want to import your suppliers' details into Basware Network, you can download and fill out a Partner List Template and import their details using the import tool.
- **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 the Basware Network.

4.1 Add a new company to your network

You can use the Network view in Basware Network to add new companies to your network.



1. On the top menu, click **Network > Business Directory**.
2. Enter the name of the company you are looking for in the **Search** field and click **Search**.

The companies that match your search are displayed in the list below.

3. Under the **Business Link**, click **Add to Network**.
4. In the **Add to My Network** popup window, click **Yes** to add the company to your network, or **No** to cancel the operation.

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](#).