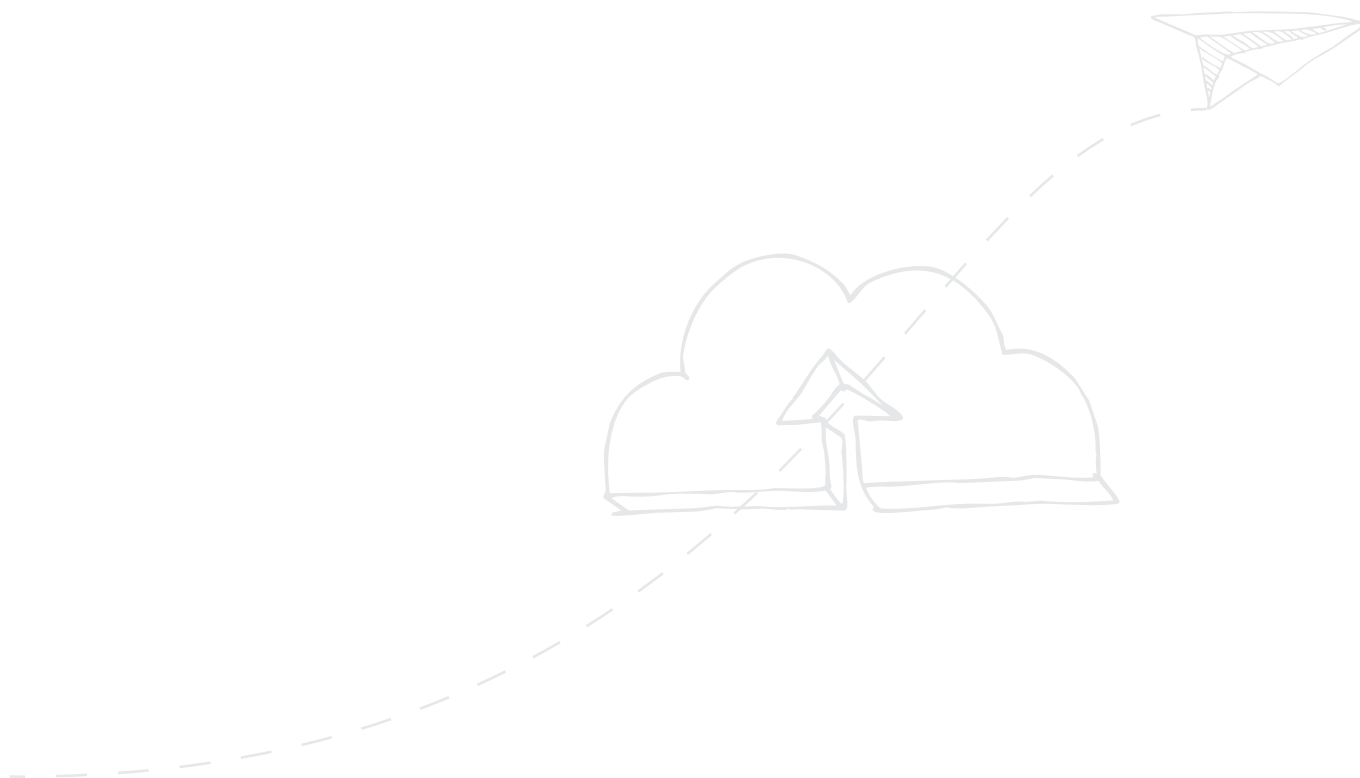


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1 Overview

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

Basware sets up the conversion process when you send the first invoice into the service. In order for the service to work, the invoices that you send in must have the same layout as the first invoice. Because the invoices are read electronically, the content of each invoice must be in [machine-readable](#) text format - the invoices cannot be hand-written, scanned or contain the information in image format.

For more information on invoice content, see [Make sure the invoice meets your customer's requirements](#)



2 Getting started

Before you can start sending e-invoices to your customers with Basware PDF e-Invoice, you must:

- [Sign up for Basware Portal](#)
- [Activate Basware PDF e-Invoice service](#)
- [Create a PDF Invoice](#).

After you have activated the service and created a PDF invoice, you can [send your first PDF invoice to the service](#).

2.1 Sign up for Basware Portal and activate Basware PDF e-Invoice

Basware PDF e-Invoice is a part of Basware Portal. Before you can activate Basware PDF e-Invoice, you must sign up for an account in Basware Portal.



If you cannot complete these steps in one session, you can continue the process by opening the [Basware PDF e-Invoice service page](https://portal.basware.com/service/emailLite): `https://portal.basware.com/service/emailLite`



1. Open the Basware PDF e-Invoice service 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 web address looks like this: `https://portal.basware.com/join/aBcD12345`



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

The Basware PDF e-Invoice service page in Basware Portal opens.

basware Language English ▾ Log in

Send e-Invoices by Email

Send PDF invoices to your customer by email

This month, over 10 million documents have been exchanged between businesses on the Basware Commerce Network

Sign up for free

Sign Up

[Read Basware General Terms](#)

- Send e-invoices with ease and keep your customers happy
- Deliver invoices quickly and receive payments faster
- Keep track of your invoices online
- Send e-invoices for free

How it works

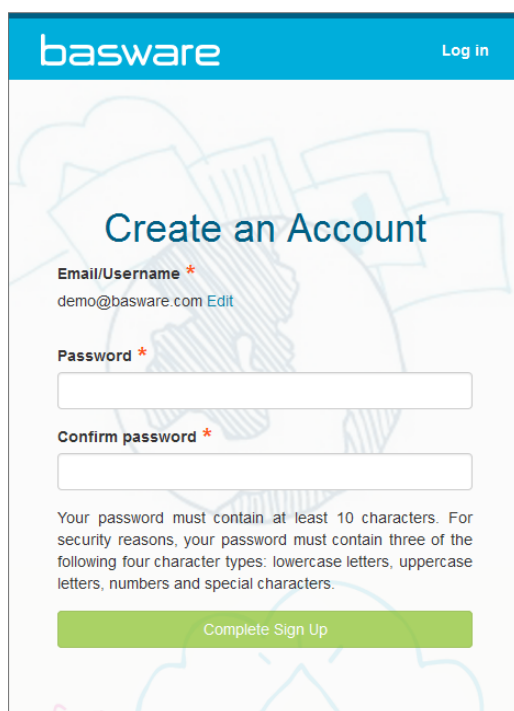
Step #1	Step #2	Step #3	Step #4
Sign up and activate your account	Find your customers email address and invoicing instructions	Email your PDF invoice to your customers email address	Basware creates an e-invoice based on your PDF and delivers the e-invoice and the PDF to your customer.

About Basware

Basware provides secure and trusted solutions that work best for customers and vendors business document exchange by leveraging our expertise as the leading provider of purchase-to-pay and e-invoicing solutions that scale from the smallest to the largest businesses effortlessly.

basware [Contact](#) [in](#) [f](#)

2. Click **Sign Up**.
The **Create an Account** page opens.



3. Choose a username to the service.



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, click **Edit** and enter that address in the **Email/Username** field.

4. Choose a secure password and enter it in the **Password** and **Confirm password** fields.
5. Click **Complete Sign Up** to create a new Basware Portal account.

The service sends a confirmation message to your email address.



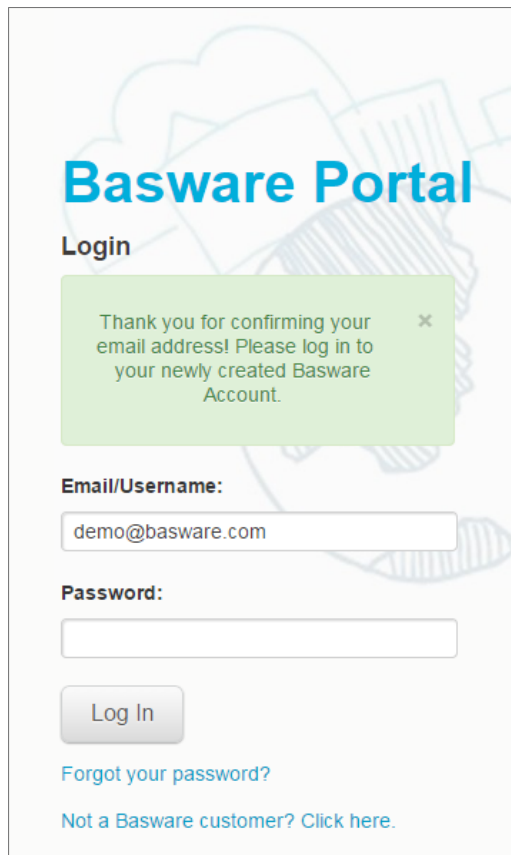
It may take a while before the confirmation message is delivered to your email address. If you do not receive the confirmation message within an hour, contact Basware Support: <https://kb.basware.com/contacting-support/>.

6. Open the confirmation message and follow the link in the message to activate your account.



If you do not follow the link in the confirmation message **within 72 hours**, your user account will not be activated, and you cannot use this service. If you cannot activate your user account, contact Basware Support for assistance: <https://kb.basware.com/contacting-support/>.

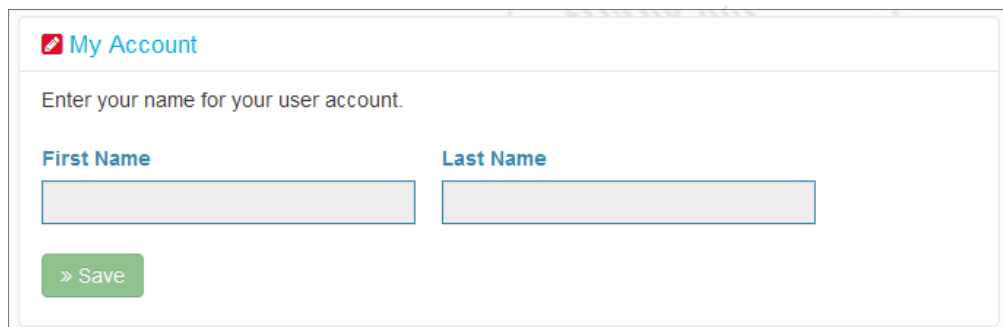
The login page opens and you'll see a confirmation message telling you that your account has been activated.

The image shows the Basware Portal login page. At the top, the text "Basware Portal" is displayed in a large blue font. Below it, the word "Login" is in a smaller black font. A green success message box with a close icon (X) contains the text: "Thank you for confirming your email address! Please log in to your newly created Basware Account." Below the message, there are two input fields: "Email/Username:" with the value "demo@basware.com" and "Password:" which is empty. A "Log In" button is positioned below the password field. At the bottom, there are two links: "Forgot your password?" and "Not a Basware customer? Click here." in blue text. The background of the login form has a faint, stylized illustration of a person's head and shoulders.

7. Enter your **Username** and **Password**, and click **Log In**.

The service logs you into Basware Portal. Now, you must fill in some details about your organization to activate the Basware PDF e-Invoice service.

8. First, fill in your personal details in the **My Account** section, and click **Save**.

The image shows the "My Account" section of the Basware Portal. It has a title "My Account" with a small red icon. Below the title, it says "Enter your name for your user account." There are two input fields: "First Name" and "Last Name", both of which are empty. Below these fields is a green button with the text "» Save".

9. In the **My Organization** section, fill in your organization's details and click **Save**.



Enter your company's Sales Tax number, VAT identification number, email address or a similar unique identifier in the **Organization's 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://kb.basware.com/contacting-support/>.

My Organization

Fill in your organization's name and address along with unique identifiers such as Tax number and DUNS code. These are used to identify your organization within the Basware Commerce Network.

Organization

Street

City **Postal Code** **State**

Country

Organization's Identifiers

Add Identifier

Save

10. In the **Organization's Contact Information** section, enter the details of the person your clients can get in touch with if they have any queries, and click **Save**.

Organization's Contact Information

Fill in your organization's contact person and their contact information.

Contact Name

Email **Phone**

Save

11. In the **I Send Invoices From** section, click **Add Email Address** to add email addresses from which you will to send PDF invoices to your customer.
You can add up to 5 email addresses.



If you want to change an email address or if you need to add a new email address later on, open the [Basware PDF e-Invoice service page](#) and add a new address through the **View Details** tab.

A screenshot of a web interface titled "I Send Invoices From". Below the title is a section labeled "Invoicing Addresses". Inside this section, there is a green plus icon followed by the text "Add Email Address" and a question mark icon. Below this is a text input field with a minus icon to its right. At the bottom of the section is a green button with the text "» Save".

12. Tick the **I accept the Basware General Terms** checkbox.
13. Click **Activate** to activate the service.

Once you have activated the service, open the **Search Customers** tab, and find your customer's supplier information kit. The supplier information kit is a guide that tells you everything you need to take into account when you send PDF invoices electronically to your customer.

Some customers may require that you include certain mandatory fields in your invoices. If you fail to include these fields in your invoice, your customer will automatically reject your invoice. For more information, see [Create a PDF invoice](#).

2.2 Create a PDF invoice

If your current software can generate PDFs in [machine-readable](#) format, you can use it to generate a PDF invoice. If your current software does not allow you to create PDFs, you can transform the invoice into PDF format using a PDF creation software. For more information, see [List of free PDF tools](#).

When you create PDF invoices, you need to:

- [Make sure the invoice meets your customer's requirements](#)
- [Make sure the invoice meets the service's requirements](#)
- [Make sure the invoice is machine readable](#)

Once your PDF invoice meets the requirements above, you can [Send your first invoice](#).

2.2.1 Make sure the invoice meets your customer's requirements

Your customer requires that the invoices you send into Basware PDF e-Invoice service contain pre-defined invoice fields. If any of these fields are missing from the invoice, Basware will not deliver the invoice to your customer.

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. Open the Basware PDF e-Invoice service page in your web browser:
<https://portal.basware.com/service/emailLite>.
2. Click **Search Customers** to open the **Search Customers** tab.

Overview View Details What Next? Search Customers			
Search by organization's name, organization's identifier or customer's email address			» Search
Showing 50 results (Scroll down for more)			
Company Name	Company Identifiers	Company's PDF Invoice Address	Invoicing Instructions
████████	████████	@email.basware.com	Supplier-Kit-MB.pdf
████████	████████	@email.basware.com	Supplier-Kit-MB.pdf

Figure 1: Search Customers tab

3. Use the search to find your customer.
4. Download your customer's supplier information kit to view their invoicing requirements.

2.2.2 Make sure the invoice meets the service's requirements

Each PDF invoice that you send to Basware PDF e-Invoice must:

- use PDF version 1.4 or later
- be [machine-readable](#) and searchable.
- contain all the invoice fields required by Basware and your customer. For more information, see [Make sure the invoice meets your customer's requirements](#).
- be written in a supported language. Basware PDF e-Invoice currently supports the following languages: Danish, Dutch, English, Estonian, Finnish, French, German, Hungarian, Italian, Polish, Portuguese, Spanish, Swedish, Norwegian.

2.2.3 Make sure the invoice is machine readable

Basware reads the invoices sent into the service electronically. Therefore, the PDF invoice cannot contain invoice data in image format.



1. Open the invoice you created.
2. Select one or more lines of invoice data using your mouse.
3. Copy the invoice data to clipboard.
4. Paste the invoice data into a word processing software, for example **Notepad**, **TextEdit**, or **WordPad**.

2.3 Send your first invoice

When you send in the first PDF invoice, Basware maps the invoice fields you used on the invoice to the data format that Basware Portal uses. The invoices that you send to the service after this must:

- use the same layout
- use the same language.



Before you send your first invoice, contact your customer and let them know that you will start sending them invoices using Basware PDF e-Invoice service.



1. Open the Basware PDF e-Invoice service page in a web browser: <https://portal.basware.com/service/emailLite>.
2. Click **Search Customers** to open the **Search Customers** tab.

The screenshot shows the 'Search Customers' tab in the Basware portal. At the top, there are navigation links: 'Overview', 'View Details', 'What Next?', and 'Search Customers'. Below these is a search bar with the placeholder text 'Search by organization's name, organization's identifier or customer's email address' and a green 'Search' button. Below the search bar, it says 'Showing 50 results (Scroll down for more)'. A table displays the search results with the following columns: 'Company Name', 'Company Identifiers', 'Company's PDF Invoice Address', and 'Invoicing Instructions'. Two rows of results are visible, each showing a company name, identifiers, an email address ending in '@email.basware.com', and a link to 'Supplier-Kit-MB.pdf'.

Company Name	Company Identifiers	Company's PDF Invoice Address	Invoicing Instructions
[Redacted]	[Redacted]	@email.basware.com	Supplier-Kit-MB.pdf
[Redacted]	[Redacted]	@email.basware.com	Supplier-Kit-MB.pdf

Figure 2: Search Customers tab

3. Use the search to find your customer.
Your customer's email addresses to which you can send PDF invoices are listed in the **Company's PDF Invoice Address** column.
4. Write down your customer's PDF invoice address.
5. Create an invoice with your invoicing software and save it as a PDF file.

For instructions, see [Create a PDF invoice](#).

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



Text written on the subject line will not be delivered to your customer. Text in the message body will be delivered to your customer as an attachment.

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



You can only send one PDF invoice in each email. If you want to send multiple invoices, you must create a separate email for each invoice.

8. If you want to send invoice attachments to your customer, attach them to the email.
 - a. Change the name of the attachment so that it contains the word **attachment**, **anlage**, **adjunto**, **annex**, or **liite**.

For example, `attachment_112233.pdf`.



If the attachment name does not contain the word **attachment**, **anlage**, **adjunto**, **annex**, or **liite**, the message will be rejected. The service will then send you a notification saying that your message has been rejected.

- b. Attach the invoice attachment to the email message.
9. Type your customer's PDF invoice address in the **To** field.

For example, `acme.buyer@email.basware.com`.

10. Send the email.

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

Basware notifies you once the first invoice has been successfully delivered to your customer. Basware will also notify you, if the invoice cannot be delivered.

The expected average delivery time for the first invoice is one business day. Do not send the same invoice again to the service.

3 Managing invoices

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

3.1 Sending invoices



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 only send one PDF invoice in each email. If you want to send multiple invoices, you must create a separate email for each invoice.



Text written on the subject line will not be delivered to your customer. Text in the message body will be delivered to your customer as an attachment.

3. If you want to send invoice attachments to your customer, attach them to the email.

For instructions, see [Attaching files to invoices](#).

4. Type your customer's PDF invoice address in the **To** field.

For example, `acme.buyer@email.basware.com`.

You can check the customer's contact information on the **Search Customers** tab on the [Basware PDF e-Invoice service page](#) in Basware Portal.

5. Send the email.

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

3.2 Attaching files to invoices

Basware PDF e-Invoice lets you attach additional PDF files to invoice emails. Basware PDF e-Invoice forwards these files to your customer along with the original PDF invoice.



1. Change the name of the attachment so that it contains the word **attachment**, **anlage**, **adjunto**, **annex**, or **liite**.

For example, `attachment_112233.pdf` or `123anlage.pdf`.



If the attachment name does not contain the word **attachment**, **anlage**, **adjunto**, **annex**, or **liite**, the message will be rejected. The service will then send you a notification saying that your message has been rejected.

2. Add the invoice attachments to the email that contains the invoice you want to send.
3. Send the email to Basware PDF e-Invoice service.

For instructions, see [Sending invoices](#).

3.3 View invoice statuses

When you log in to [Basware Portal](#), 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.



When you log into [Basware Portal](#), you'll see a list of documents that you've sent and received in the last 30 days. To see all your documents, close the **Date Range** pane at the top of the **Search Results** table.



1. Open the [Documents](#) page in Basware Portal
The URL of the page is `https://portal.basware.com`.
2. Enter the invoice number in the **Search** field.

3. Click **Search**.

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

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

Figure 3: Search Results table

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

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

Figure 4: Sort by labels

5. To view an invoice, click the title of the invoice in the **Search Results** table and the [Business document page](#) opens.



The service notifies you, typically within 7 to 14 days, if you have forgotten to open an invoice that you've received from your business partner.



4 List of free PDF tools



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

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

Troubleshooting and frequently asked questions

Can I send to invoices other customers?

The Basware PDF e-Invoice service is available only to e-invoice receivers, who sponsor the service to their suppliers. You can find a list of receivers by opening the **Search Customers** tab on the [Basware PDF e-Invoice service page](#). If you want to send invoices to other receivers please visit the [Basware web site](#) and read about our other e-invoicing services.

How to make sure that the PDF invoice will be accepted by the service?

Make sure that the invoice data on the PDF invoice is [machine-readable](#). If the text you copied contains only strange characters, please change the font used on the invoice and create the PDF again.

How can I check whether the invoice was delivered to the receiver?

You will receive an email confirmation for the first invoice after it has been successfully delivered. You can check the status of the later invoices in [Basware Portal](#). For instructions, see [View invoice statuses](#).

What can I do, if my receiver tells me that the invoices did not arrive?

Locate the invoices and check their status in [Basware Portal](#). If the invoices are listed in Basware Portal, the receiver should be able to see them, too.

If you cannot find the invoices in Basware Portal:

- Check the outbox of your email client and make sure that the invoices have been sent.
- Make sure that you have sent the invoices to the address listed on your customer's contact information. You can check the customer's contact information on the **Search Customers** tab on the [Basware PDF e-Invoice service page](#).
- Make sure that you have sent the invoices from an email address that you confirmed when registering to the service. You can check the confirmed email addresses on the **Search Customers** tab on the [Basware PDF e-Invoice service page](#).

What can I do, if I want to add another email address for sending invoices?

If you want to change the email addresses from which you send invoices, please visit the [Basware PDF e-Invoice service page](#) in Basware Portal.

I received a notification saying that an invoice was rejected. What happened and what can I do to correct the issue?

The receiver has requested that Basware checks that the invoice meets all their requirements. If the invoice does not contain all fields that the receiver has requested, Basware rejects the invoice. The invoice may also be rejected, if it is sent from an unregistered address, or if the invoice attachments do not meet the requirements of the service. For more information, see [What type of error messages does the service send out?](#)

What type of error messages does the service send out?

Basware PDF e-Invoice sends out, among others, the following types of error messages:

Table 1:

Message Title	Reason	Solution
Your message sent to the Basware PDF e-Invoice service has been rejected!	Message was sent from an unregistered email address.	<ul style="list-style-type: none"> Resend the message from a registered email address Register the email address on the View Details tab on the Basware PDF e-Invoice service page in Basware Portal and resend the message.
Your message sent to the Basware PDF e-Invoice service has been rejected!	The email you sent: <ul style="list-style-type: none"> Did not contain a PDF invoice Contained more than one PDF invoice Contained one PDF invoice and invoice attachments, but filenames of the invoice attachments did not contain the words <i>attachment</i>, <i>anlage</i>, <i>adjunto</i>, <i>annex</i>, or <i>liite</i>. 	<ul style="list-style-type: none"> Resend the message with only one PDF invoice attached. If you want to send invoice attachments, rename the invoice attachments so that their filenames contain the word <i>attachment</i>, <i>anlage</i>, <i>adjunto</i>, <i>annex</i>, or <i>liite</i>.
Dear receipient, the document could not be delivered due to the following reason.	The PDF invoice contained invalid information	<ul style="list-style-type: none"> Correct the content of the PDF invoice according to the information provided in the email notification.

What I need to do if I want to change the layout of my invoice?

Changing the layout of your invoices once mapped in the service is not possible as this would prevent us from extracting the necessary data from your invoice.

Can I use words from any language for the attachment keyword?

No, you can use only the words *attachment*, *anlage*, *adjunto*, *annex*, or *liite*.

What happens if I send an invoice twice? Will it be delivered to my customer twice, or you are checking for duplicates?

The service does not perform any checks for duplicate invoices. However, the receiver may have duplicate checks in place. Please confirm with them, if you require a check for duplicate invoices.

Can I send credit notes and/or invoices that contain line item data? What happens, if I send an invoice with line item data?

Yes, you can. Invoices that contain line item data can be freely sent to buyers through the service. However, the service does not map or extract line item data from your invoice and deliver it to the receiver. The receiver will still be able to see the line item data on the PDF invoice delivered alongside the e-invoice.

Can I send .ZIP files that contain the PDF invoice and attachments?

No, you can only send PDF files to the service.

Can I track the status of my invoices sent through Basware PDF e-Invoice on Basware Portal?

Yes, you can. For instructions, see [View invoice statuses](#).

How do I take the local invoicing requirements into account?

Basware PDF e-Invoice service does not support the use of digital signatures. Depending on local regulations there may be a need to ensure the authenticity and integrity of an invoice. This may be achieved by using normal, internal business controls that create a reliable audit trail between the invoice and the supply of goods or services. Local authorities should be consulted if the user is uncertain what the respective local regulations state and how the requirements can be best fulfilled.

What do I need to archive?

Depending on the local regulations, you may need to archive, for example, the PDF invoice that you created or a paper printout of the PDF invoice.

