

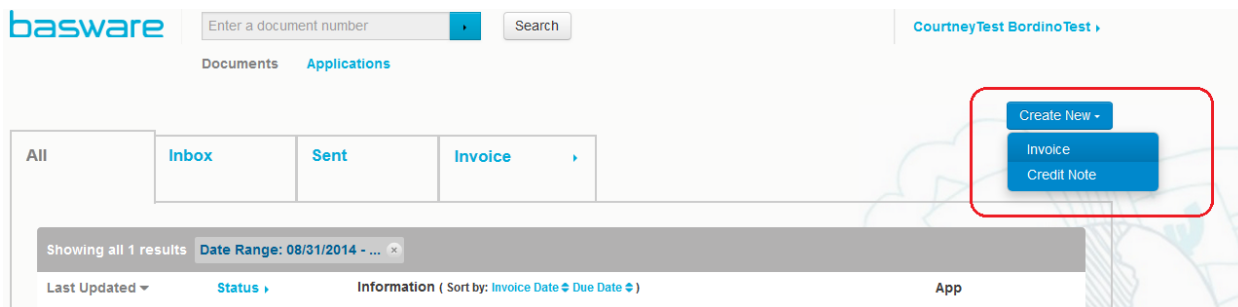
Basware Portal User Guide: BBSI – Invoice Key In

1. Accessing Basware Portal

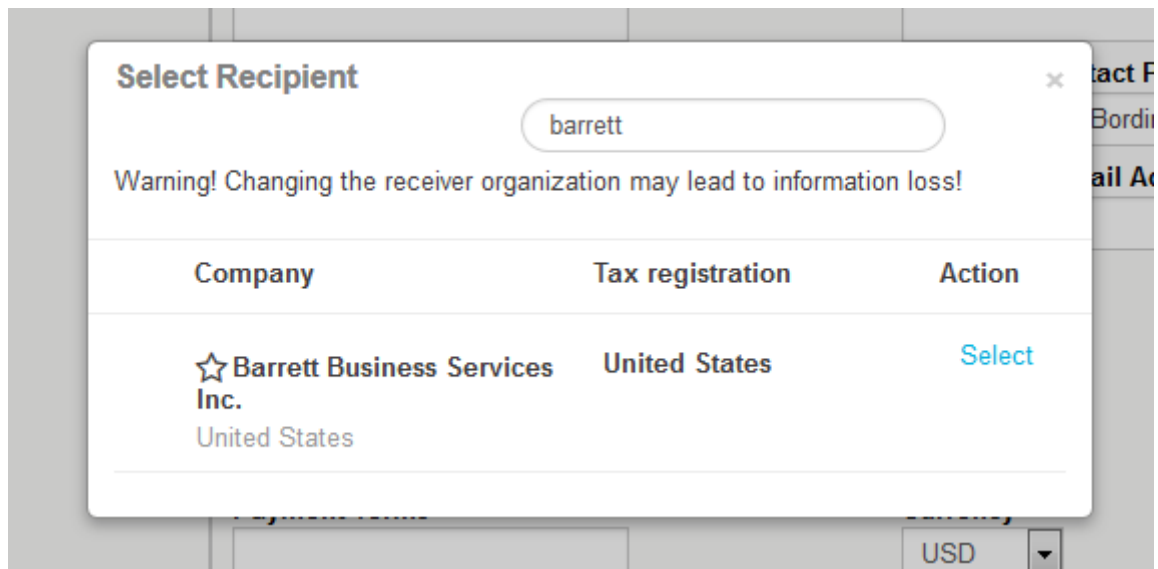
Go to: <https://portal.basware.com/>. Enter your username and password. You will then be directed to the home screen.

2. To Create an Invoice

- a. Click “Create New” in top right corner and select “Invoice”.



- b. On the left side you will click “Search Recipient”
- c. In the pop up box, type in the word “Barrett” into the search bar and press enter.
 1. You can mark the recipient as a favorite by clicking on the star next to the name. Then they will always appear first in the recipient list.



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d. Some of the required information will auto populate – please do not change any of this information.

e. On the right side of the screen, you will need to enter information into the **Invoice Number**, **Buyer Reference**, and **Recipient's Email Address** fields.

1. **Invoice Number**: please enter your invoice number

2. **Buyer Reference**: please enter the complete email address of your buyer contact at BBSI.

For example: adam@bbsihq.com is acceptable. If you enter Adam Jones, that is not acceptable.

3. **Recipient's Email Address**: please change this address to the branch address

TEST
123 Main Street
Parsippany, NJ, 07054
United States
» Change

» Edit Ship From Address

Recipient
Barrett Business Services Inc.
8100 NE Parkway Drive Suite 200
Vancouver WA
98662
United States
» Change

invoicing Address
<<Endpoint>>
US5208129771
» Edit Delivery Address

» Edit Construction Site

Invoice Number
1234

Recipient's Invoicing Address
US5208129771

Tax Identification Number
-

Supplier's Reference Number

Delivery Date

Recipient's Contact Person

Contract Number

Buyer Reference
Email adam@bbsi.co

Payment Terms

Purchase Order Number

Supplier's Contact Person
CourtneyTEST BordinoTEST

Recipient's Email Address
Basware@bbsihq.com ?

Currency
USD

f. Please leave all other fields blank. The above three fields are the only fields which need to be populated by you.

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- g. Scroll down the page and click **Add Line**

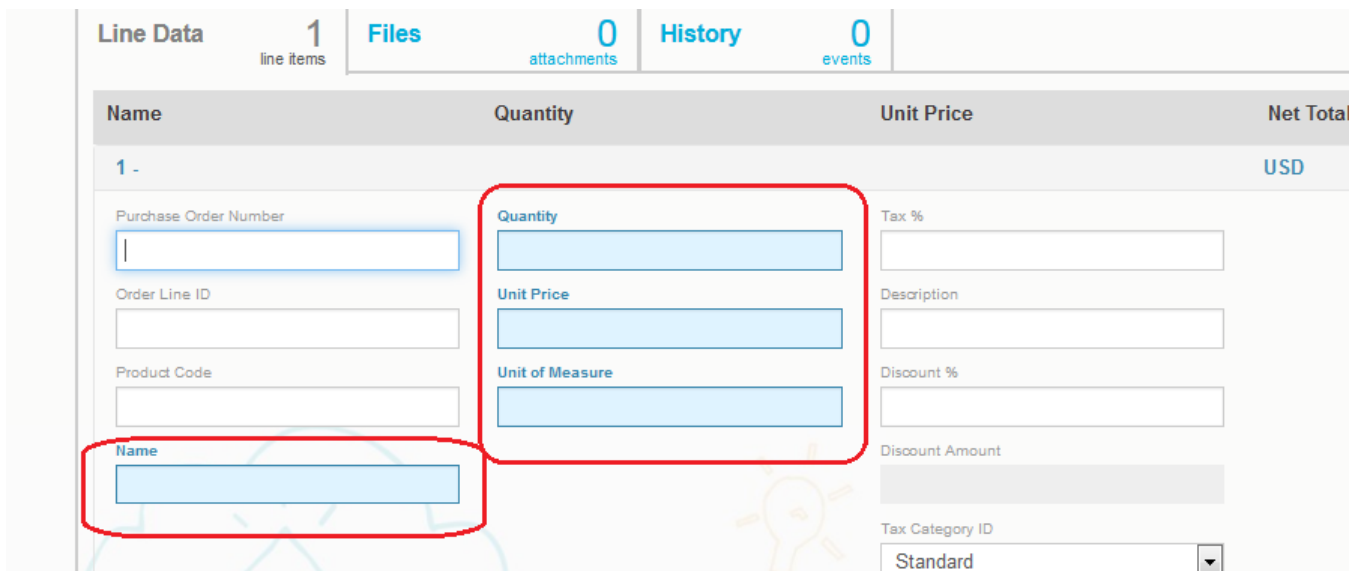


- h. You will need to enter the following information for each invoice line:

1. **Name:** Description of the service/product
2. **Quantity:** Quantity of the service/product
3. **Unit of Measure:** Please type “EA” and select **Each** or “HO” and select **Hour**
4. **Unit Price:** Net amount, format should be ##.## (please do not add the \$) For items less than a dollar, format should be #.## (for example 0.95)

- i. If you charge for shipping, please enter that as a separate line item (click Add Line).

1. Please ensure the Name field is entered as: **Shipping**



Name	Quantity	Unit Price	Net Total
1 -			USD

Purchase Order Number:

Order Line ID:

Product Code:

Name:

Quantity:

Unit Price:

Unit of Measure:

Tax %:

Description:

Discount %:

Discount Amount:

Tax Category ID:

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- j. Please add your original invoice to the system as well. Click **“Files”**.

The screenshot shows the Basware Portal interface. At the top, there are three tabs: 'Line Data' (1 line items), 'Files' (0 attachments), and 'History' (0 events). The 'Files' tab is highlighted with a red box. Below the tabs, there is a table with the following columns: 'Line ID', 'Name', and 'Amount To Be Invoiced'. The table contains one row with 'Line ID' 1, 'Name' (a blue box), and 'Amount To Be Invoiced' 0.00. Below the table, there is a green button labeled '+ Add Service Line'.

1. You will upload the file by clicking the green text and then selecting the file from your computer.

The screenshot shows the Basware Portal interface. At the top, there are three tabs: 'Line Data' (1 line items), 'Files' (0 attachments), and 'History' (0 events). Below the tabs, there is a section titled 'Show/hide requirements'. The section contains the following text: 'The file type is unsupported. Please make sure that the file you upload is in .csv, .doc, .docx, .html, .jpeg, .odt, .pdf, .png, .ppt, .pptx, .rtf, .tif, .b. The file name of the file you have selected is too long. Please select a file whose file name is a maximum of 75 characters long. The file you have selected is too large. Please select a file smaller than 5MB. Total size of attachments must not exceed 25MB'. Below this text, there is a green button labeled 'Click here to browse for files, or drag and drop files directly here to attach them to the invoice'. The button is highlighted with a red box.

- k. You now can **“Send Invoice”** by clicking the button at the top of the screen.

The screenshot shows the Basware Portal interface. At the top, there are three buttons: '» Discard Draft' (orange), '» Save Draft' (green), and '» Send Invoice' (blue). The 'Send Invoice' button is highlighted with a red box. Below the buttons, there is a status bar that says 'Saved at 6:11 PM'. Below the status bar, there is a section titled 'Invoice Number' with a value of 1004.


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FAQs and Tips

Organization ID

When registering you provided your Tax ID as the Organization ID. Please ensure you follow the below instructions before submitting any invoices.

1. Log in to the Basware Portal
2. Click on your **Username** (top right in blue) then select **My Organization**.
3. Then select **Edit** (in green).
4. Go to the Organization Identifier section
5. The following information is mandatory:
 - a. Select **TIN** in the drop down box.
 - b. Enter your **Tax ID** (TIN) in the box to the right.



Organization's Identifiers + Add Identifier

TIN 12-1212121 ? -

6. Then click **Save Changes**
7. To return to the home screen, click **Basware** in the top left corner

Add User

Please follow the below instructions if you'd like to add a user to your account.

1. Main user logs in to the Basware Portal
 2. Click on your **Username** (top right in blue) then select **My Organization**.
 3. Then select **More Actions** and **Add User**.
 5. Then fill in the required information for the new user:
 - a. Email Address
 - b. User Name (should be the email address)
 - c. Select the Language
 6. Then click **Save Changes**
 7. The user will receive an email address to confirm their account.
 8. To return to the home screen, click **Basware** in the top left corner
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Filters/Searches

There are different search and filtering options within the Basware Portal.

Please ensure if you are looking for a specific document, you ensure the date filter is not on. You can remove it by clicking the “x” next to the date range – see below.

