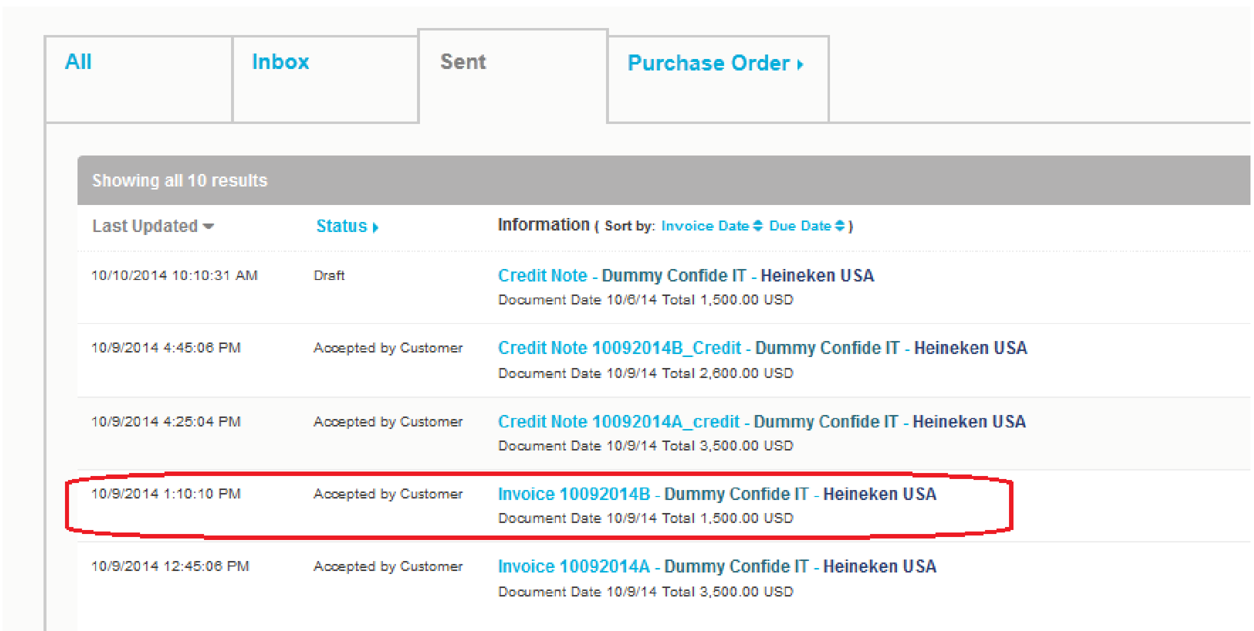
1. Accessing Basware Portal

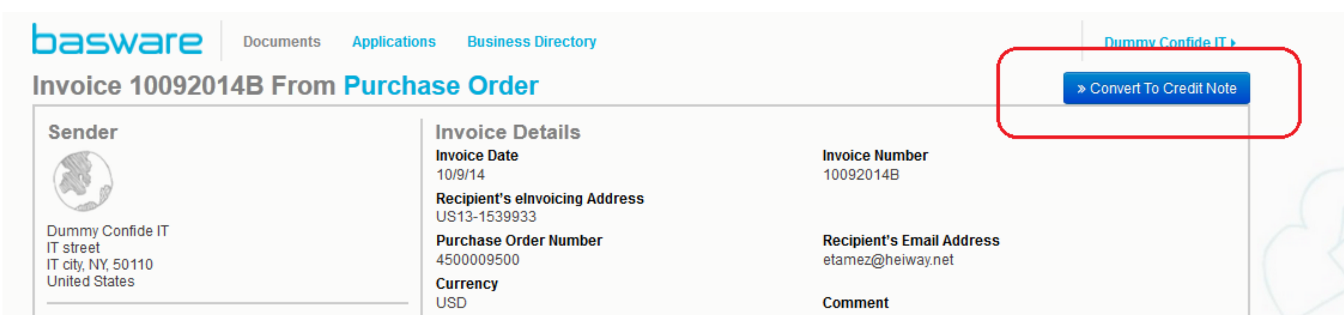
Go to: https://portal.basware.com/. Enter your username and password. You will then be directed to the home screen.

2. To Create a Credit Note

a. The first thing to note, is that you must create a credit note from an invoice.
b. So please select the invoice you'd like to create the credit from.



c. Then click "**Convert to Credit Note**" in the top right corner.



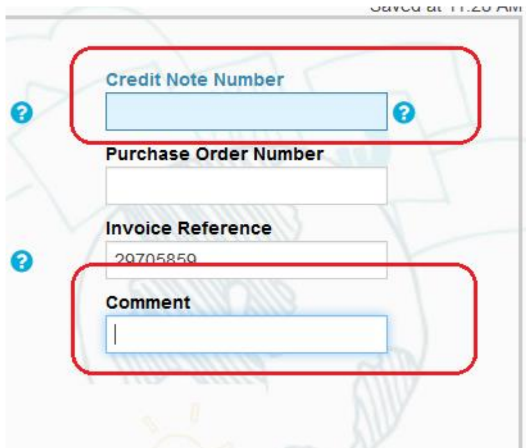
d. Enter the **Credit Note Number** in the corresponding field.

e. If you had invoiced the wrong PO, please copy and paste the below text into the comments field:

1. *Credit created due to incorrect PO, please remove*

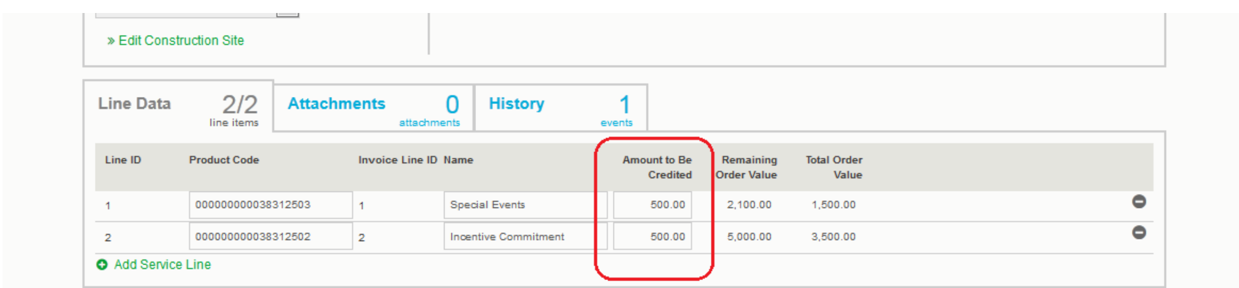
f. If you over invoiced a line item(s) of the PO, please copy and paste the below text into the comments field:

1. *Credit created due to amount over invoiced, please remove*



g. Review the data on the invoice.

1. Adjust the **Amount To Be Credited,** so it reflects the proper amount to be credited on that invoice.
2. Any line not credited has to be either deleted or the amount should be ”0”. (Please ensure all line items are accurate).



h. Once you are satisfied with the invoice, please scroll to the top and select “**Send Credit Note**”.