

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

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

All	Inbox	Sent	Purchase Order ▾
Showing all 10 results			
Last Updated ▾	Status ▾	Information (Sort by: Invoice Date ▴ Due Date ▴)	
10/10/2014 10:10:31 AM	Draft	Credit Note - Dummy Confide IT - Heineken USA Document Date 10/8/14 Total 1,500.00 USD	
10/9/2014 4:45:06 PM	Accepted by Customer	Credit Note 10092014B_Credit - Dummy Confide IT - Heineken USA Document Date 10/9/14 Total 2,600.00 USD	
10/9/2014 4:25:04 PM	Accepted by Customer	Credit Note 10092014A_credit - Dummy Confide IT - Heineken USA Document Date 10/9/14 Total 3,500.00 USD	
10/9/2014 1:10:10 PM	Accepted by Customer	Invoice 10092014B - Dummy Confide IT - Heineken USA Document Date 10/9/14 Total 1,500.00 USD	
10/9/2014 12:45:06 PM	Accepted by Customer	Invoice 10092014A - Dummy Confide IT - Heineken USA Document Date 10/9/14 Total 3,500.00 USD	
10/1/2014 2:02:32 PM	Delivery in Progress	Invoice Test due date - Dummy Confide IT - Heineken USA	

- Then click “Convert to Credit Note” in the top right corner.


Documents Applications Business Directory

Invoice 10092014B From Purchase Order

Sender


Dummy Confide IT
IT street
IT city, NY, 50110
United States

Invoice Details

Invoice Date
10/9/14

Recipient's invoicing Address
US13-1539933

Purchase Order Number
4500009500

Currency
USD

Invoice Number
10092014B

Recipient's Email Address
etamez@heiway.net

Comment

Convert To Credit Note

- 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*

SAVED AT 11:20 AM

Credit Note Number

Purchase Order Number

Invoice Reference

20705850

Comment

- 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).

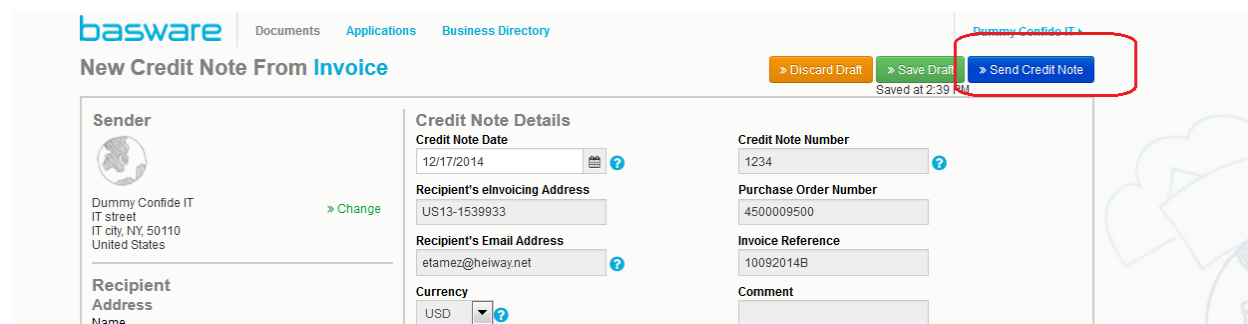
[» Edit Construction Site](#)

Line Data	2/2 line items	Attachments	0 attachments	History	1 events
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Line ID	Product Code	Invoice Line ID	Name	Amount to Be Credited	Remaining Order Value	Total Order Value
1	000000000038312503	1	Special Events	500.00	2,100.00	1,500.00
2	000000000038312502	2	Incentive Commitment	500.00	5,000.00	3,500.00

[Add Service Line](#)

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



The screenshot shows the 'New Credit Note From Invoice' page in the Basware portal. At the top right, there are three buttons: 'Discard Draft' (orange), 'Save Draft' (green), and 'Send Credit Note' (blue). The 'Send Credit Note' button is highlighted with a red rectangle. Below the buttons, the form is divided into several sections:

- Sender:** Includes a globe icon, a 'Change' link, and the address: 'Dummy Confide IT', 'IT street', 'IT city, NY, 50110', 'United States'.
- Recipient:** Includes fields for 'Address' and 'Name'.
- Credit Note Details:**
 - Credit Note Date:** 12/17/2014
 - Recipient's Invoicing Address:** US13-1539933
 - Recipient's Email Address:** etamez@heiway.net
 - Currency:** USD
- Credit Note Number:** 1234
- Purchase Order Number:** 4500009500
- Invoice Reference:** 10092014B
- Comment:** (empty field)