

# SUPPLIER KIT

## HOW TO SEND PDF- INVOICES

APRIL 2019



Suppliers follow the  
Supplier Kit.



YMCA OF THE TRIANGLE  
improves purchase to  
payment cycle and process  
efficiency.



Invoices are paid on time,  
saving time and money.

# Content

- YMCA OF THE TRIANGLE is moving to electronic invoicing .....3
- Registration process .....4
  - 1. Create an account .....4
  - 2. Fill in your company details .....5
  - 3. Add email address(es) for PDF invoices .....5
- Start sending PDF-invoices .....5
  - 1. Create a PDF-invoice .....6
  - 2. Attachment policy .....6
  - 3. Send the PDF-invoice.....7
  - 4. Invoice delivery .....7
- A. Company Profile .....8
- B. Mandatory content requirements for PDF-invoices.....8
- C. Invoice validation and rejections .....9
- D. Invoice monitoring .....9

**YMCA OF THE TRIANGLE is moving to electronic invoicing**

This guide contains detailed instructions on how to send PDF-invoices to YMCA OF THE TRIANGLE. When following these instructions, YMCA OF THE TRIANGLE will receive PDF-invoices as electronic invoices. This service is free of charge.

Watch the short registration video attached in this [link](#) and activate the service.

Register for Basware Portal: [portal link](#) .

- Open the registration link that you received from YMCA OF THE TRIANGLE.
- Add to Basware Portal the email address(es) from which you will send PDF-invoices.
- Go to your email- or invoicing software and attach a PDF-invoice to your email and start sending.

If you have questions about sending invoices to YMCA OF THE TRIANGLE, please do not hesitate to contact us as per below:

**Contact details**

<b>YMCA OF THE TRIANGLE</b>	Questions regarding invoice content	<a href="mailto:accountspayable@ymcatriangle.org">accountspayable@ymcatriangle.org</a>
<b>Basware Customer Support</b>	Questions on Basware service	<a href="#">ServiceNow</a>

**Useful links**

<b>PDF e-Invoice user guide</b>	User guide in English	<a href="https://basware.servicenow.com/bw?id=bw_kb_article&amp;sys_id=82cbcca5db31d304394380ab0b961989">https://basware.servicenow.com/bw?id=bw_kb_article&amp;sys_id=82cbcca5db31d304394380ab0b961989</a>
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Kind regards,

YMCA OF THE TRIANGLE

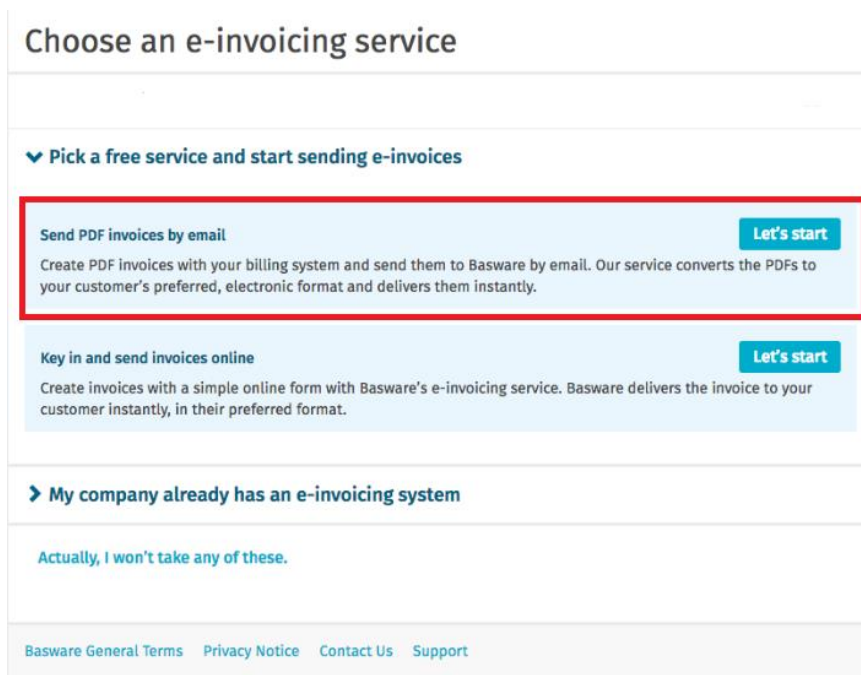
## Registration process

By using this free of charge PDF-service you can start sending e-invoices to YMCA OF THE TRIANGLE. To get started you must register to the PDF e-Invoice service via Basware Portal. You only need to register once to be able to send PDF-invoices to YMCA OF THE TRIANGLE.

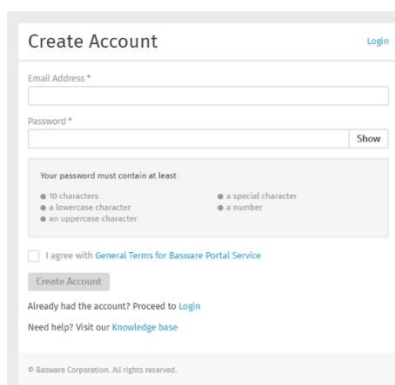
### 1. Create an account

Open the registration link that you received from YMCA OF THE TRIANGLE.

On the service landing page, click **Get started**. On the next page, choose Send PDF invoices by email option and click **Let's start**.



**Create an Account** page opens:



Enter your email address, choose a secure password and create the account. The service sends a confirmation message to your email address. The confirmation message is sent from <no.reply@basware.com> and could end up in your spam filter. Open the confirmation message to activate your account.

## 2. Fill in your company details

Now, you must fill in some details about your organization to activate the Basware PDF e-Invoice for Receiving - service. In the Company Details section, fill in your basic organization's details – company identifier, company name and address. Also, the primary contact of your company should be filled in.

## 3. Add email address(es) for PDF invoices

To add the email address(es) from which you will send PDF e-Invoices, click **Add new email address** from Service Setting tab. You can only send invoices from the address(es) that you define here. Invoices sent from other addresses will not be delivered to YMCA OF THE TRIANGLE. You can add up to 200 email addresses here.

Each additional email addresses used to send invoices from must be confirmed before invoices can be processed.

### PDF e-Invoice

Company Details > **Service Settings** > Instructions

Customize the way the service works

▼ **Email addresses for invoicing \***

Enter the email address(es) from which you will send invoices to your customers. The service rejects invoices sent from addresses other than the ones listed below.

	Confirmed
<input type="text"/>	<input type="checkbox"/>

[Add new email address](#)

If you wish to add more email addresses later, please go to the [Basware Portal](#) and login. Go to the tab **Services** and click on the box named **PDF e-Invoice**. Click on **View details**. Next, go to section **I send invoices from** and click on **Add an email address** from which you will send invoices to YMCA OF THE TRIANGLE.

## Start sending PDF-invoices

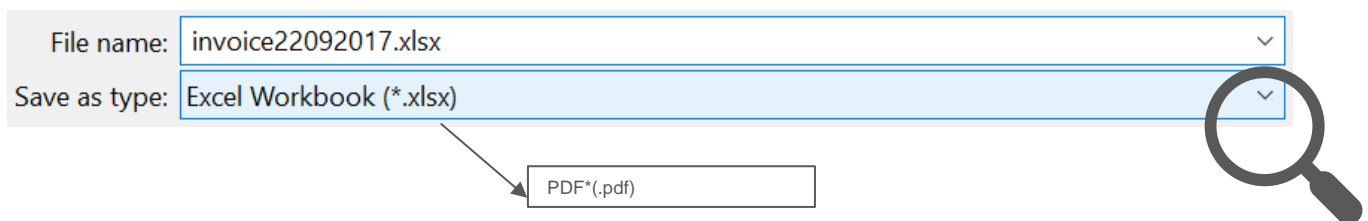
Make sure that you have completed the registration and clicked **Activate** on the final page of the registration flow. Now you can go to your email or invoicing software and create a PDF-invoice. For the service to work, the invoices that you send must have the same layout as the first invoice. Because 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. Please make sure that your PDF-invoices are machine-readable and that they are sent to the correct YMCA OF THE TRIANGLE email address for PDF-invoices (found in section A of this supplier kit).

## 1. Create a PDF-invoice

There are many ways you can create a PDF invoice:

- You can use your current accounting software, if it allows you to export invoices in machine-readable PDF format.
- You can use a word processing or spreadsheet software - for example, tools from the Microsoft Office, if it allows you to save documents in machine-readable PDF format:



## 2. Attachment policy

If you need to add additional attachments to your email message, such as a delivery note, please make sure that you follow the attachment policy for additional attachments:

- You can only send attachments in PDF format. The service ignores all other attachment types.
- Name the attachment so that it contains the word attachment, anhang, anlage, adjunto, annex, or liite. For example, attachment\_112233.pdf.
- If you send multiple attachments, Basware recommends that you send only one invoice per each email.
- If you must send multiple PDF e-Invoices and attachments in a single email, follow these guidelines:
  - Make sure that each attachment has the keyword attachment in their filename.
  - Make sure that each attachment is associated to a business document PDF:
    - Single business document PDF: each attachment is automatically linked to the business document PDF.
    - Multiple business document PDFs: attachments are linked to a business document PDF, if the filename of the attachments contains the filename (without the file extension) of the business document. For example, document1\_attachment.pdf will be linked to document1.pdf.
  - The attachments are valid, if:
    - The email contains at least one business document PDF.
    - Each extra attachment is linked to a business document PDF.

More information about the attachment policy can be found [here](#).

### 3. Send the PDF-invoice

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. It is possible to attach multiple invoices into one email.
3. If you want to send additional invoice attachments to your customer, such as delivery notes, please attach them to the email. Attachments must always be delivered together with the PDF-invoice. For instructions on how to name the additional attachments, see Attachment Policy.
4. Type YMCA OF THE TRIANGLE PDF-invoice address in the email receiver field. YMCA OF THE TRIANGLE email addresses for PDF-invoices are found in section A of this supplier kit.
5. Send the email.

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**THE BASWARE PDF-SERVICE DELIVERS TO YMCA OF THE TRIANGLE ONLY PDF-INVOICES THAT ARE SENT FROM EMAIL ADDRESSES THAT ARE REGISTERED TO THE SERVICE. THE SERVICE WILL AUTOMATICALLY REJECT INVOICES THAT ARE SENT FROM AN UNREGISTERED EMAIL ADDRESS.**

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### 4. Invoice delivery

Basware sets up the conversion process when you send the first invoice into the service. For the service to work, the invoices that you send in must have the same layout as the first invoice.

Basware will notify you by email when the first email has been delivered to YMCA OF THE TRIANGLE successfully. The first PDF-invoice can take a few business days to be mapped and delivered to YMCA OF THE TRIANGLE. No further confirmation emails will be sent unless there are delivery problems with the invoices.

### A. Company Profile

Please use the following email addresses when sending PDF-invoices to YMCA OF THE TRIANGLE:

Company Unit	Company E-invoice Address	E-mail address
The Youth Men's Christian Association of the Triangle Area, INC	US560591307	<a href="mailto:YMCATriangle.einvoice@email.basware.com">YMCATriangle.einvoice@email.basware.com</a>

### B. Mandatory content requirements for PDF-invoices

Please ensure that the following information is included in your PDF-invoice prior to your email being sent. If one mandatory field (M) is found empty, your invoice will be returned.

Type of information	Comment
<b>Invoice number</b>	
<b>Invoice date</b>	
Due Date	If applicable
Delivery Date	If applicable
Currency	
<b>Full name of the customer</b>	
<b>Full address of the customer</b>	
Receiver Business number (Buyer Business ID)	
Full name of the sender (Supplier Name)	
Full address of the sender (Supplier Address)	
Sender TIN (Supplier Business ID)	
Sender Bank Account	
Full Remit to Address	
Subtotal (net amount)	
<b>Total Gross Amount (Total)</b>	
Total Tax Amount (Taxable Amount)	
Percent (Summary Tax Percent)	
Contract/Account/Payment Plan Number	If applicable
PO Number	
Buyer Reference	



### C. Invoice validation and rejections

Typical scenarios where the PDF-invoice is being rejected:

- The PDF invoice file is not machine-readable.
- The email invoice was sent from an un-registered email address.
- A mandatory field does not have content.
- The name of the additional attachment file does not include one of the following words: attachment/anlage/adjunto/annex/liite.

Basware will notify by email if the invoice cannot be delivered. Please note, the rejection notifications are sent to the email address, from which the invoice was sent. Therefore, please ensure the email address is a monitored mailbox.

If you have more questions about the rejection messages, please review the [FAQs here](#).

### D. Invoice monitoring

If you want to check on invoice delivery status, please go to the [Basware Portal](#) and login. Go to the tab **Documents** and see an overview of your sent PDF-invoices.

Please note that the first PDF-invoice that you send to YMCA OF THE TRIANGLE new email addresses can take a few business days to be delivered and visible in the portal. Basware will notify you by email when the first email has been delivered to YMCA OF THE TRIANGLE successfully. No further confirmation emails will be sent unless there are delivery problems with the invoices.

For other purposes you do not need to login or use the portal anymore, it was only needed once for registration and activation of the service.