



Simplify Operations, Spend Smarter.

USER GUIDE

Basware Invoice Key-In and PO Flip (June 2022)



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1 Service Overview

Invoice Key-In and PO Flip is a service that you can access through the Basware Network website. The Invoice Key-In and PO Flip service lets you:

- create and send electronic invoices
- receive electronic purchase orders, if your customer sends them through this service. The service can also notify you by email when you receive a new purchase order.
- create new invoices based on purchase orders you have received.

This quick guide gives you a brief overview of the most common features of the Invoice Key-In and PO Flip service. For detailed information, see the [Basware Network User Guide](#).

1.1 Open and close the service

Basware Network and its related services are online tools. This means that you only need a modern web browser to access and use the services.



1. To open the service:

Log in with your **Username** and **Password** at <https://portal.basware.com>.

2. To close the service:

In the top-right corner of the page, click **[Your Username] > Log Out**.

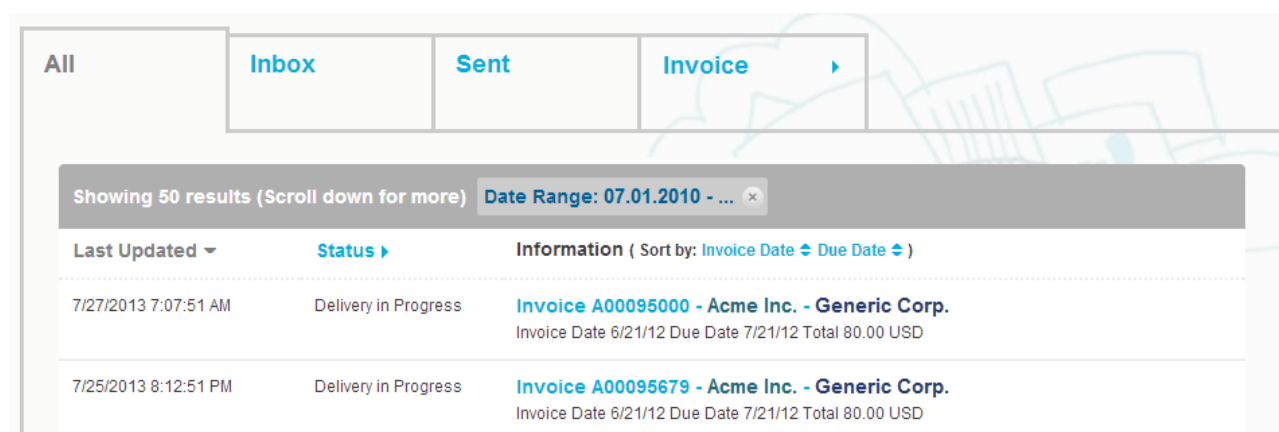
2 Working with invoices, credit notes, and other business documents

Business documents are documents that your company uses to interact with other companies. Common business documents include, for example, invoices and credit notes. With Basware Network, you can:

- [Create an invoice](#)
- [Accept a purchase order](#)
- [Propose a change to a purchase order](#)
- [Reject a purchase order](#)
- [Convert a purchase order into an invoice](#)

2.1 Getting an overview of your business documents

The **Documents** page gives you an overview of all your business documents - **invoices**, **purchase orders**, and **credit notes** - and their statuses. You can manage your organization's business documents on the **Documents** page. You can use the search field at the top of the page to find documents, and the page is divided into several tabs to help you browse your documents with ease.



All	Inbox	Sent	Invoice ▶
Showing 50 results (Scroll down for more) Date Range: 07.01.2010 - ... ✕			
Last Updated ▼	Status ▶	Information (Sort by: Invoice Date ⬆ Due Date ⬆)	
7/27/2013 7:07:51 AM	Delivery in Progress	Invoice A00095000 - Acme Inc. - Generic Corp. Invoice Date 6/21/12 Due Date 7/21/12 Total 80.00 USD	
7/25/2013 8:12:51 PM	Delivery in Progress	Invoice A00095679 - Acme Inc. - Generic Corp. Invoice Date 6/21/12 Due Date 7/21/12 Total 80.00 USD	

Figure 1: Documents page

The tabs contain the following business documents:

All	Shows all the business documents that your organization has either sent or received.
Inbox	Shows all the business documents that your organization has received.
Sent	Shows all the business documents that you have sent to your business partners. The tab also shows the draft versions of all the business documents that you are working on.
Business document tab	The rightmost tab on the page shows all business documents of a certain type that your organization has sent and received. Click the label of the tab to select which types of documents are shown on this tab.

2.2 Create an invoice



1. On the **Documents** page, click **Create New > Invoice**.

Basware Network opens the **Edit Invoice** view and creates a draft invoice.

2. Select a sender.

By default, the service selects your favorite organization as a sender. If you want to change the sender, do the following:

- a) Under **Sender**, click **Change**.
- b) Find the company that you want to select as the sender, and click **Select**.



Click the ☆ icon next to the name of a company to set that company as your favorite. Your favorite companies are always displayed at the top of the list.

3. Select a recipient:

- a) Click **Select Recipient**.
- b) Find the company that you want to select as the recipient, and click **Select**.

Use the search field to filter out companies from the list.

Select Recipient

×

Search by name

Company	Tax Registration	Action
<div>☆ DEMO BUYER</div> <div>Finland</div>	<div>Finland</div> <div>VAT 32132147</div>	Select
<div>☆ DEMO SUPPLIER</div> <div>Finland</div>	<div>Finland</div> <div>VAT 51515151</div>	Select

Figure 2: Select Recipient window



If the recipient that you selected has a tax registration number in multiple countries, a list of available tax registration countries opens. Select the tax registration country that you want to use with this invoice.



Click the ☆ icon next to the name of a company to set that company as your favorite. Your favorite companies are always displayed at the top of the list.

4. Enter the invoice details.

The service validates the contents of the fields and notifies you if the content of a field does not pass validation. For descriptions of the fields, see [Invoices](#).

5. Enter the line data.

- a) On the **Line Data** tab, click **Add Line** to add a new invoice line.

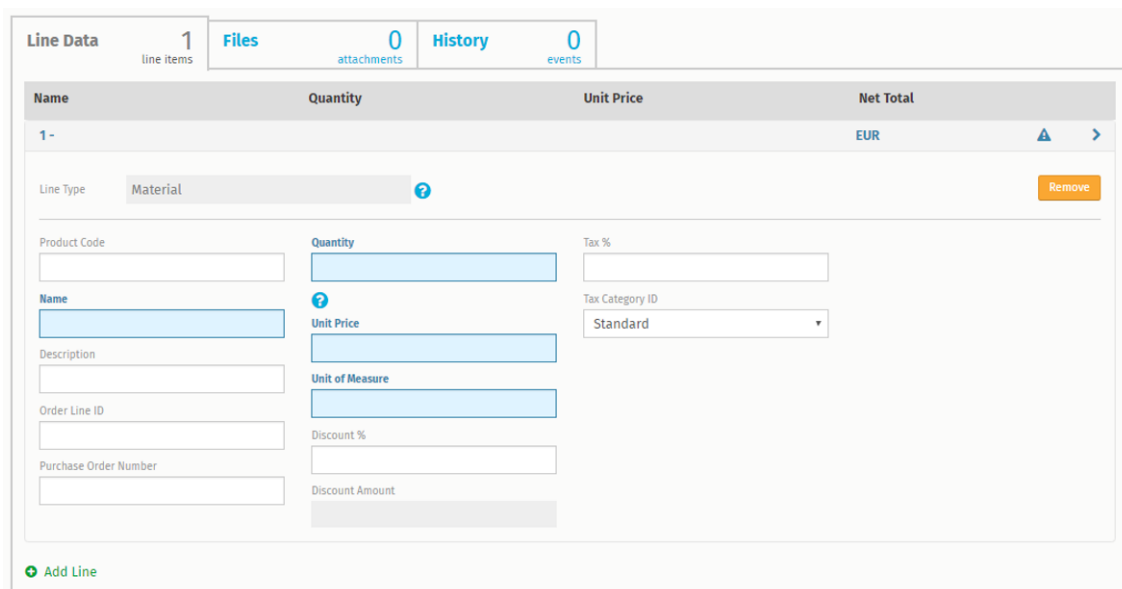


Figure 3: Invoice lines

- b) Enter the details of the line item.
- c) Click **Add Line** to add another line item, if necessary.
6. Add invoice attachments.
- a) Click **Files** to open the **Files** tab.
- b) Click the highlighted text to browse for attachments, or drag and drop files directly on the highlighted text to attach them to the document.



If the sender organization's profile has no bank account, you can add a bank account in the **Sender's Details** section. Bank accounts that are added directly to an invoice are not saved to the organization's profile.

7. Click **Send Invoice** to send the invoice to your customer.



Basware Network does not store the invoice data indefinitely. Remember to download a copy of the document image through the Files tab and store it locally.

2.3 Accept a purchase order

When you receive a purchase order from your customer, you must accept it before you can invoice the ordered items.



1. On the **Documents** page, click on a purchase order to open it.
2. Review the purchase order.

- If the contents of the purchase order are correct, proceed to the next step.
 - If the contents of the purchase order are not correct, you can [reject the purchase order](#)
 - If the contents of the purchase order are not correct and you want to make small changes, you can [propose a change to the purchase order](#).
3. Click **Accept** to accept the purchase order.
The **Accept Purchase Order** popup opens
 4. If you want to add comments to the recipient, enter them in the **Comments to buyer** field.
 5. Click **Confirm** to accept the purchase order.
The purchase order is now in *Accepted* status, and you can convert it into an invoice.

2.4 Convert a purchase order into an invoice

You can convert purchase orders that are in *Accepted* status into invoices.



1. On the **Documents** page, click a purchase order that you have accepted to open it.
2. Click **Convert to Invoice** to convert the purchase order into an invoice.

Basware Portal converts the purchase order into a draft invoice. All data from the purchase order is copied onto the draft invoice.

For instructions on how to edit and send the invoice, see [Create an invoice](#), and follow the instructions from step 3 onwards.

2.5 Propose a change to a purchase order



The section describes an optional Basware service. You need the Invoice Key-In and PO Flip service to follow these instructions.

If you receive a purchase order that you cannot, for example, fulfil completely, you can propose a change to the purchase order.



1. On the **Documents** page, click a purchase order to open it.
2. Review the purchase order.
3. Click **Propose Change** to reject the purchase order.
The **New Purchase Order Response** page opens.
4. Under **Promised Delivery Date**, set a delivery date:
 - To define a common delivery date for all line items, select the **Specify delivery information at header** radio button, and choose a date under **Promised Delivery Date**.
 - To define a delivery date for each line item separately, select the **Specify delivery information at line level** radio button.
5. Click the line item to which you want to propose a change.
A detailed view of the line item opens.

Name	Quantity	Unit Price	Net Total
1 - Name	1,000.00 04	12.00	12,000.00 EUR

Product Code

P100

Quantity

1,000.00

Sales Tax %

5.00

Delivery Date

06/18/2015

Name

Name

Unit Price

12.00

Discount %

Ship From Address

Name

Description

Pen

Unit of Measure

04

Street

City

Postal Code

Country

Select Country

You can propose changes to as many line items as necessary.

6. Update the line item details to which you want to propose a change.
7. Click **Send Response** to send your proposed changes to the buyer.

2.6 Reject a purchase order

If you receive a purchase order that you cannot fulfil, you can reject the purchase order.



1. On the **Documents** page, click a purchase order to open it.
2. Review the purchase order.
3. Click **Reject** to reject the purchase order.

The **Reject Purchase Order** pop-up window opens

4. In the **Comments to buyer** field, add a comment that describes why you have rejected the purchase order.
5. Click **Confirm** to reject the purchase order.

The purchase order is now set to the *Rejected* status. Basware Network notifies the buyer that you have rejected their purchase order.

3 Contact Basware Support

If you cannot find the information you are looking for in this document, please have a look at the [Online Help](#). In case you cannot find the information you are looking for there, either, please contact Basware Support. The Basware Support personnel will assist you in using the application and send all suggestions for improvement related to the applications or documentation to the supplier of the system.

To find the contact information of Basware Support, visit [Basware Knowledge Base](#).

You can also contact Basware Support by clicking the Chat tab that is available on each page. This opens the **Chat with Basware Support** pop-up window that lets you send questions to Basware Support.

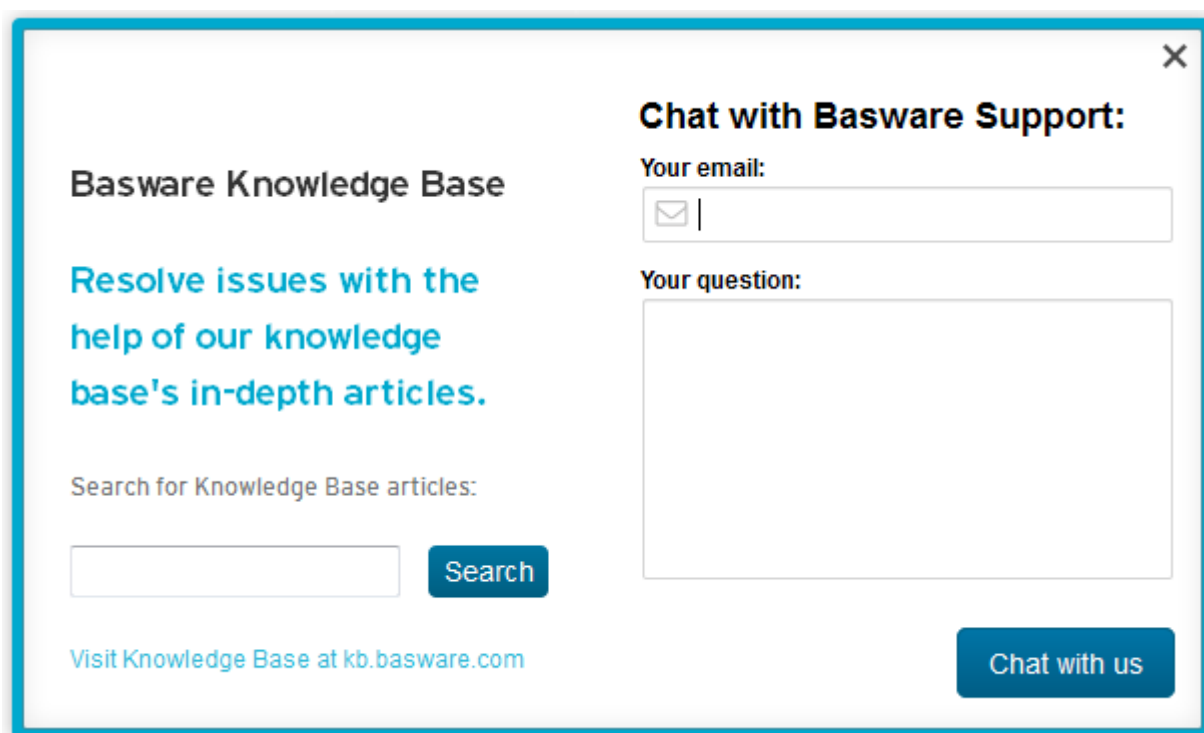


Figure 4: Chat with Basware Support popup window