



Simplify Operations, Spend Smarter.

## QUICK GUIDE

Basware PDF e-Invoice for Receiving (June 2022)

# 1 Overview

Your customer expects you to send e-invoices. A quick and easy way to meet their expectations is to sign up for Basware PDF e-Invoice for Receiving service. Simply create a PDF invoice with your regular invoicing software and email it to your customer's Basware Service address. Basware PDF e-Invoice for Receiving then reads the invoice data from the PDF invoice, creates an electronic invoice based on the data, and delivers both the electronic invoice and the PDF invoice to your customer.

Basware sets up the conversion process when you send the first invoice into the service. In order for the service to work, the invoices that you send in 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. For more information about invoice content, see the [Basware PDF e-Invoice for Receiving User Guide](#).

This quick guide walks you through the registration process, which in total takes about 5-10 minutes. For more information, see the [Basware PDF e-Invoice for Receiving User Guide](#).

If you have any problems with the registration process, please contact [Basware Support](#).

## 2 Getting started

Before you can start sending e-invoices to your customers with Basware PDF e-Invoice for Receiving, you must:

- [Sign up for a Basware Network account](#)
- Activate Basware PDF e-Invoice for Receiving service

Once you have completed these steps, you can send your first PDF invoice to the service. Basware provides you with additional information during the service's setup phase.

### 2.1 Sign up for a Basware Network account and activate the service

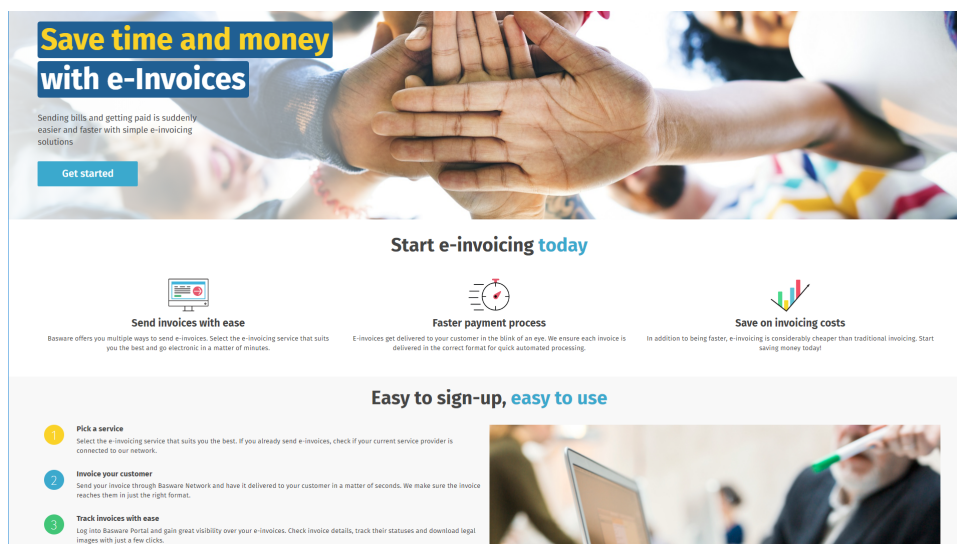
Basware PDF e-Invoice for Receiving is a part of Basware Network. If your customer requires you to register to the service, you must sign up for a Basware Network account.

1. Open the Basware PDF e-Invoice for Receiving service's landing page.
  - If you received an email invitation, follow the link in the invitation.
  - If you received an invitation letter, enter the web address in the invitation letter into your browser's address bar.

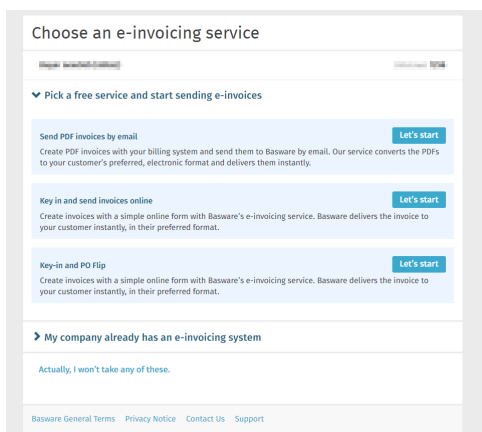


The letters used in the web address are case-sensitive.

The Basware PDF e-Invoice for Receiving service's landing page in Basware Network opens.

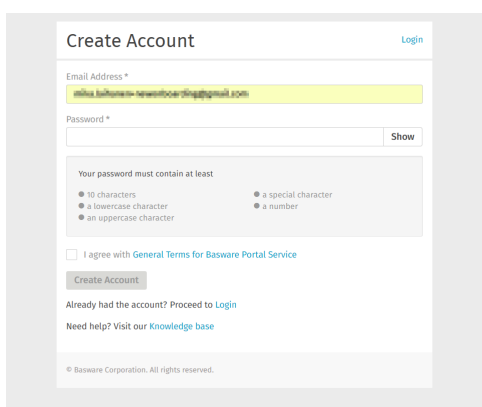


2. On the service landing page, click **Get Started**.  
The **Choose your e-invoicing service** page opens.



3. Select **Send PDF invoices by email** and click **Let's start**.

The **Create Account** page opens.



4. Choose a username and enter it in the **Email Address** field.



The service selects the email address that your invitation was sent to as your username. If you want to use another email address as your username, enter that address in the **Email Address** field.

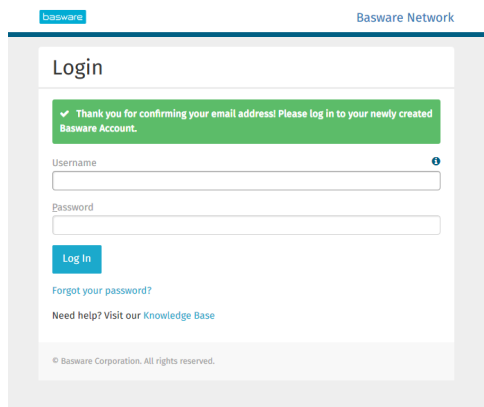
5. Choose a secure password and enter it in the **Password** field.
6. Read the **General Terms for Basware Portal service** and tick the checkbox to confirm that you agree to the terms.
7. Click **Create Account** to create a new Basware Network account.

The service sends a confirmation message to your email address.



It may take a while before the confirmation message is delivered to your email address. If you do not receive the confirmation message within an hour, contact Basware Support: [https://basware.service-now.com/bw?id=bw\\_sc\\_cat\\_item\\_public](https://basware.service-now.com/bw?id=bw_sc_cat_item_public).

8. Open the confirmation message and click **Confirm Your Email** to activate your account. The login page opens and you'll see a confirmation message telling you that your account has been activated.



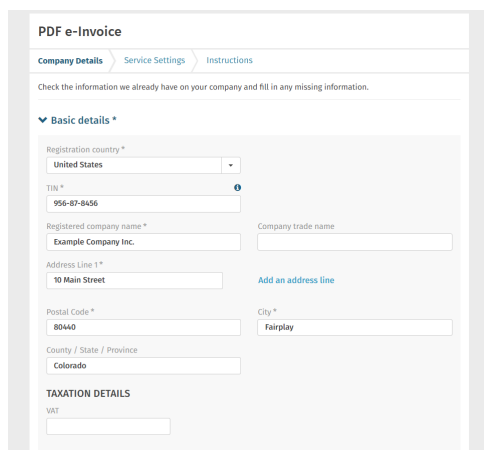
The screenshot shows the 'Login' page of the Basware Network. At the top, there's a green message box that says: '✓ Thank you for confirming your email address! Please log in to your newly created Basware Account.' Below this, there are input fields for 'Username' and 'Password'. A blue 'Log In' button is positioned below the password field. Links for 'Forgot your password?' and 'Need help? Visit our Knowledge Base' are also present. At the bottom, a small copyright notice reads: '© Basware Corporation. All rights reserved.'



If you get a message that says your confirmation link has expired, you must start the registration process over. To do this, open the link in the invitation you received and sign up to the service again.

**9. Enter your **Username** and **Password**, and click **Log in**.**

The PDF e-Invoice for Receiving service pages open.



The screenshot shows the 'PDF e-Invoice' form. It has three tabs: 'Company Details', 'Service Settings', and 'Instructions'. The 'Company Details' tab is active. Below the tabs, there's a message: 'Check the information we already have on your company and fill in any missing information.' The form is divided into sections. The 'Basic details' section is expanded, showing fields for 'Registration country' (set to 'United States'), 'TIN' (set to '956-87-8456'), 'Registered company name' (set to 'Example Company Inc.'), 'Company trade name', 'Address Line 1' (set to '10 Main Street'), 'Postal Code' (set to '80440'), 'City' (set to 'Fairplay'), 'County / State / Province' (set to 'Colorado'), and 'TAXATION DETAILS' with a 'VAT' field.

**10. In the **Basic details** section, fill in your company's details.**

**11. In the **Primary contact** section, enter the details of the person, who will be your company's primary contact towards Basware.**

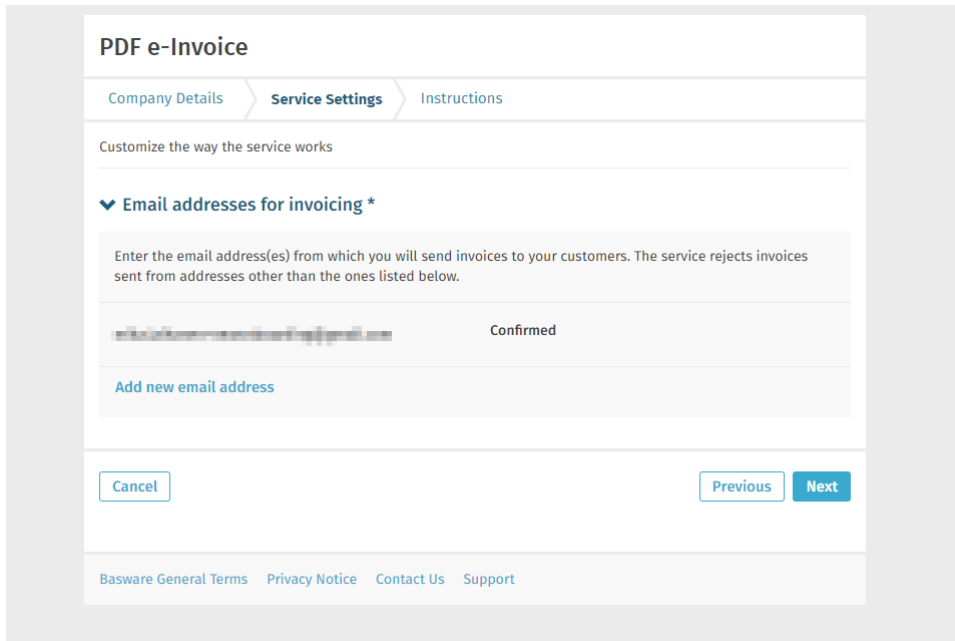
**12. Click **Next**.**

**13. In the **Service settings** section, set your service preferences.**

Click **Add new email address** to add all the email addresses from which you will send PDF e-Invoices. You must confirm each of the email addresses that you add to the service by opening the confirmation link sent to the address.



You can only send invoices from the addresses that you define here. Invoices sent from other addresses will not be delivered to the recipients.



14. Click **Next**.

15. In the **Instructions** section, review your customer's e-invoicing instructions.

16. Click **Complete** to complete the onboarding process and activate the service.

Once the service has been activated, you will be redirected to the **Documents** page in **Basware Network**.

You are now ready to send your first invoice to your customer. Please refer to the PDF e-Invoice for Receiving [user guide](#) for more information on how to send PDFs to the service.