



Simplify Operations, Spend Smarter.

## **USER GUIDE**

Basware PDF e-Invoice for Sending (June 2022)

# Table of Contents

<b>1 Overview .....</b>	<b>3</b>
<b>2 Getting started.....</b>	<b>4</b>
2.1 Create a PDF invoice.....	4
2.1.1 Make sure the invoice meets the compliance requirements.....	4
2.1.2 Make sure the invoice follows the invoice layout and invoice type used during the setup phase.....	4
2.1.3 Make sure the invoice meets the service's requirements.....	5
2.1.4 Make sure the invoice is machine readable.....	5
2.1.5 Make sure that the invoice follows the attachment policy.....	5
<b>3 Managing invoices.....</b>	<b>6</b>
3.1 Find your customers' e-invoice addresses.....	6
3.2 Send a PDF e-invoice.....	7
3.3 View invoice statuses .....	7
3.4 How your customers receive their e-invoices.....	8
<b>4 List of free PDF tools.....</b>	<b>9</b>
<b>5 Contact Basware Support.....</b>	<b>10</b>
<b>6 Troubleshooting and frequently asked questions.....</b>	<b>11</b>
Appendix A: Attachment policy.....	13
Appendix B: Invoice content for different countries.....	15
Appendix C: Basware Message software.....	17
C.1 Install Basware Message.....	17
C.2 Sending invoices with Basware Message.....	18

# 1 Overview

Basware PDF e-Invoice for Sending service is an easy way to send e-invoices to your customers. Simply create a PDF invoice with your regular invoicing software and email it to the Basware service address. The service then reads the invoice data from the PDF invoice, creates an electronic invoice based on that data and delivers both the electronic invoice and the PDF invoice to your customer.

Sending e-invoices makes the process of handling supplier invoices easier, faster and more productive for your customers.

In order for the service to work, the invoices that you send must have the same layout as the test invoices you used in the setup phase. Because the service reads the invoices electronically, the content of each invoice must be in [machine-readable](#) text format. The invoices cannot be hand-written, scanned or contain any of the information in image format. The invoice must also meet the country compliance requirements.

## 2 Getting started

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

- deliver the required test invoices to Basware
- verify that the invoice data is mapped correctly in Basware's testing environment
- have your customers' e-invoice addresses or email addresses available.

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 Create a PDF invoice

If your current software can generate PDFs in [machine-readable](#) format, you can use it to generate a PDF invoice. If your current software does not allow you to create PDF documents, you can convert the invoice into PDF format using a PDF conversion software. For more information, see [List of free PDF tools](#).

When you create PDF invoices:

- Make sure the invoice meets the [compliance requirements](#)
- Make sure the invoice follows the [invoice layout and invoice type](#) used during the setup phase
- Make sure the invoice meets the [service's requirements](#)
- Make sure the invoice is [machine readable](#)
- Make sure the invoice follows the service's [attachment policy](#).

Once your PDF invoice meets the requirements above, you can [send your first invoice](#).

#### 2.1.1 Make sure the invoice meets the compliance requirements

Different countries have different legal requirements for the contents of an invoice. Based on those requirements, certain invoice fields are set as mandatory in the Basware PDF e-Invoice for Sending service. If any of the mandatory fields are missing from an invoice you send, Basware will not deliver the invoice to your customer but will reject the invoice. The validation only covers a certain number of fields in each country. Therefore it is your responsibility to make sure that the content of the invoices that you send comply with local rules and regulations.

You can review the country compliance requirements in [Invoice content for different countries](#).

#### 2.1.2 Make sure the invoice follows the invoice layout and invoice type used during the setup phase

When you send PDF invoices to Basware PDF e-Invoice for Sending service, the invoices must have the same fields, language and content as the invoices that you provided to the invoice data testing during the service's setup phase. If you need to make changes to the content of the invoices after the setup phase, please contact [Basware Support](#). You will be charged for the changes on time and material basis.

## 2.1.3 Make sure the invoice meets the service's requirements

Each PDF invoice that you send to Basware PDF e-Invoice for Sending must:

- use PDF version 1.4 or later
- be [machine-readable](#) and searchable.
- be written in a supported language. Basware PDF e-Invoice for Sending currently supports the following languages: Czech, Danish, Dutch, English, Estonian, Finnish, French, German, Hungarian, Italian, Lithuanian, Polish, Portuguese, Romanian, Spanish, Swedish, Norwegian.

## 2.1.4 Make sure the invoice is machine readable

Basware reads the invoices sent into the service electronically. Therefore, the PDF invoice cannot contain invoice data in image format. To make sure your e-invoice is machine-readable:



1. Open the invoice you created.
2. Select one or more lines of invoice data using your mouse.
3. Copy the invoice data to clipboard.
4. Paste the invoice data into a word processing software, for example **Notepad**, **TextEdit**, or **WordPad**.



Make sure that the invoice information is not saved to the PDF as an image. Images are not machine-readable and PDF e-invoices that contain the invoice information in image format will be rejected.

## 2.1.5 Make sure that the invoice follows the attachment policy

When you attach invoice attachments to your email message, make sure that you follow the attachment policy of the service:

- 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.
- For more information, see the [Attachment policy](#).

## 3 Managing invoices

This section describes how you can send invoices, add invoice attachments, and view the status of the invoices you have sent out.

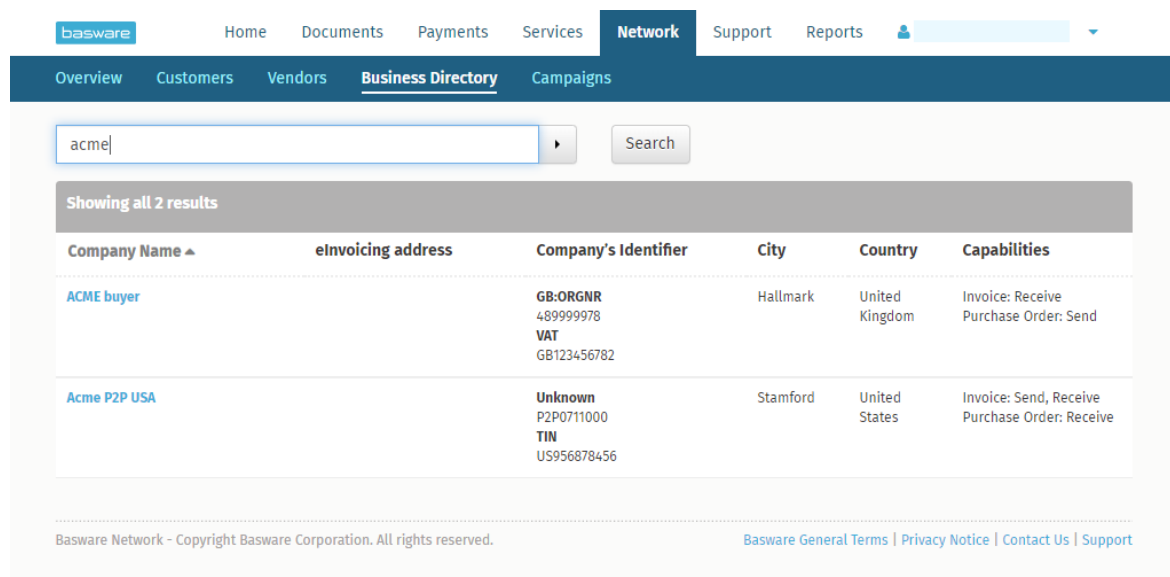
### 3.1 Find your customers' e-invoice addresses

Before you send your first PDF invoice, contact your customers and let them know that you will start sending them invoices using the Basware PDF e-Invoice for Sending service.

You can request e-invoice addresses or email addresses used for receiving e-invoices directly from your customers. To learn more about how your customers can receive your invoices, see [How your customers receive their e-invoices](#).

Alternatively, you can find your customers' e-invoice addresses in the Business Directory on the Basware Network website:

1. In [Basware Network](#), click **Network > Business Directory**.
2. Enter your customer's name in the **Search** field and click **Search**.



Company Name	eInvoicing address	Company's Identifier	City	Country	Capabilities
ACME buyer		GB:ORGNR 489999978 VAT GB123456782	Hallmark	United Kingdom	Invoice: Receive Purchase Order: Send
Acme P2P USA		Unknown P2P0711000 TIN US956878456	Stamford	United States	Invoice: Send, Receive Purchase Order: Receive

**Figure 1: Search customers in the Business Directory page**

The customers that match your search will be displayed in the Search results table

3. Find your customer's e-invoice address in the **eInvoicing Address** column and write it down.
4. Add the e-invoice address to the PDF e-invoices that you send to your customer.

Make sure that you add your customer's e-invoice address in the invoice image with the prefix **E.** Basware recommends that you place the customer's e-invoice address is in one of the customer's address fields. Typically, this requires that you update your customer's address details in your billing system.

The e-invoice address is a unique number allocated for e-invoice recipients. It is often derived from their VAT number, DUNS number or another unique company code.

If customer does not have an e-invoice address available, you can use their email address instead. You can also place a text in the layout of your paper invoices where you request your customers to provide you with their e-invoice address or email address for e-invoicing.

## 3.2 Send a PDF e-invoice

If you have purchased the Basware Message software to send PDF e-Invoices, see [Basware Message software](#) for instructions.



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.  
You can send one or more PDF invoices in each email. For instructions on how to name the PDF invoice(s), see [Attachment policy](#).
3. If you want to send invoice attachments to your customer, attach them to the email.  
For instructions on how to name the attachments, see [Attachment policy](#).
4. Type the Basware service address in the **To** field.  
[pdf-einvoice@email.basware.com](mailto:pdf-einvoice@email.basware.com)
5. Send the email.  
Basware delivers both an e-invoice data file and the PDF invoice to your customer.



Basware will notify you by email if the invoice cannot be delivered.

The expected average delivery time for the invoice is one business day. Do not send the same invoice again to the service.

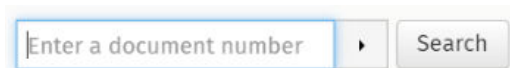
## 3.3 View invoice statuses

You can follow up invoices that you have sent with Basware e-invoice sending services on the Basware Network website.

When you log in to [Basware Network](#), you see a list of invoices that you have sent to your customers. You can check the status of each invoice on this view. If you are looking for a specific invoice, you can use search to limit the number of search results.



1. Open the [Documents](#) page in Basware Network.  
The URL of the page is <https://portal.basware.com/documents>.
2. Enter the invoice number in the **Search** field.



3. Click **Search**.  
The invoices that match your query are displayed in the **Search Results** table.

Showing 50 results (Scroll down for more) <span>Date Range: 07.01.2010 - ...</span>		
Last Updated ▾	Status ▸	Information ( Sort by: Invoice Date ⬆ Due Date ⬆ )
7/27/2013 7:07:51 AM	Delivery in Progress	<a href="#">Invoice A00095000 - Acme Inc. - Generic Corp.</a> Invoice Date 6/21/12 Due Date 7/21/12 Total 80.00 USD
7/25/2013 8:12:51 PM	Delivery in Progress	<a href="#">Invoice A00095679 - Acme Inc. - Generic Corp.</a> Invoice Date 6/21/12 Due Date 7/21/12 Total 80.00 USD

**Figure 2: Search Results table**

- To sort the results, click the **Sort** labels:

( Sort by: [Invoice Date](#) ▾ [Due Date](#) ⬆ )

**Figure 3: Sort by labels**

- To view an invoice, click the title of the invoice in the **Search Results** table.

## 3.4 How your customers receive their e-invoices

If you use your customer's e-invoice address on the invoice, the invoice will be delivered according to your customer's preference. If you use your customer's email address in the invoice, your customer will receive the first e-invoice by email by default.

When your customer receives the first e-invoice as an email, the email will contain a link to the [Basware Network](#) website, where your customers can view their invoices and change the service settings. They can, for example, define new email recipients or choose to view all their invoices online instead of receiving them as emails.

In addition, the email will contain a button with which the recipient can confirm that they have received the invoice. This, however, is a voluntary step. If the recipient does not confirm the receipt, the monitoring tool will show all unconfirmed invoices with a **Delivered to Recipient** status, and not as **Received**. The service does not send reminders to the recipients.



Basware is not responsible for undelivered invoices caused by the recipient's email and/or attachment filtering.

If the email cannot be delivered to the recipient because of an invalid email address or a technical error during the email delivery, the service will send you a notification. If the recipient has registered additional email addresses to the service, you will receive a notification about each email address where the service could not deliver the message.

If the email you have sent cannot be delivered to the main recipient, the status of the invoice viewable on the Basware Network website, will be changed from **Delivered to Recipient** to **Error in Delivery**.



## 4 List of free PDF tools



This following list of tools is provided as example only, and solely for informational purposes. It is not meant to function as an endorsement for the products that the companies in question provide. Basware Corporation has no control over the development and distribution of any of the software products listed herein. Therefore, Basware Corporation assumes no responsibility or liability for any incidental or consequential damages caused by your installing and using any of the software products listed herein.

It is likely that you can create [machine-readable](#) PDF invoices with your current software. If, however, you are unable to create PDF invoices, there are several free PDF tools available online that you can use to produce PDF invoices:

### **CutePDF™ Writer**

Developer

Operating System

Website

Acro Software

Microsoft®<sup>1</sup> Windows

[www.cutepdf.com](http://www.cutepdf.com)

### **doPDF**

Developer

Operating System

Website

Softland

Microsoft Windows

[www.dopdf.com](http://www.dopdf.com)

### **Microsoft Office Add-in: Microsoft Save as PDF**

Developer

Operating System

Website

Microsoft

Microsoft Windows

[www.microsoft.com](http://www.microsoft.com)

### **PDFConverter Desktop**

Developer

Operating System

Website

Baltsoft Software

Microsoft Windows

[www.freepdfconvert.com](http://www.freepdfconvert.com)

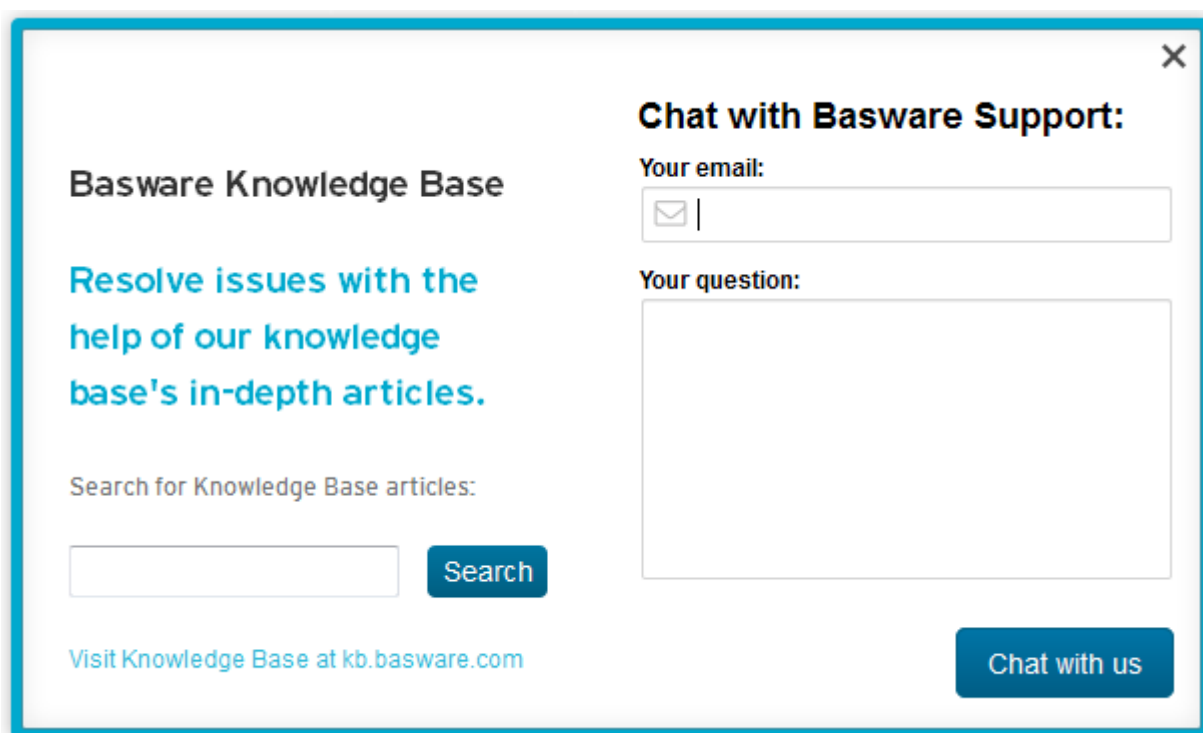
<sup>1</sup> Microsoft® is a registered trademark of Microsoft Corporation in the United States and/or other countries.

## 5 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**

# 6 Troubleshooting and frequently asked questions

## Frequently asked questions

See the FAQ in [Basware Knowledge Base](#).

### To which customers can I send e-invoices

By using the Basware PDF e-Invoice for Sending service, you can send e-invoices to any customer who has an e-invoice address or an email address. You can [find your customers' e-invoice addresses](#) in the Business Directory on the [Basware Network](#) website.

### How can I make sure that the PDF invoice will be accepted by the service?

Make sure that the invoice data on the PDF invoice is [machine-readable](#). If you copy the text from the invoice to, for example the Notepad application, and the text contains only strange characters, change the font you use on the invoice and create the PDF invoice again.

### How can I check whether the invoice was delivered to the receiver?

You can [check the status of your invoices](#) on the [Basware Network](#) website.

### What can I do if my customer tells me that they have not received my invoices?

Find the invoices and check their status on the [Basware Network](#) website. If the invoices are listed there, the recipient should be able to see them, too. If you cannot find the invoices on the website:

- Check the outbox of your email client and make sure that the invoices have been sent
- Make sure that you have sent the invoices to: [pdf-einvoice@email.basware.com](mailto:pdf-einvoice@email.basware.com)
- Make sure that you have sent the invoices from an email address that you have confirmed in the service. You can check the email addresses you have confirmed on the Basware Network website.

### How can I change or add another email address for sending invoices?

If you want to change or add email addresses from which you send invoices, please visit the [Basware Network](#) website. Click **Services** and open the PDF e-Invoice for Sending Service page. You can add more sender email addresses under your company information.

### I received a notification saying that an invoice was rejected. What has happened and what can I do to correct the issue?

Basware checks that the invoice meets country-based invoice field requirements and that the invoice data matches the layout created during the service's setup phase. If the invoice does not contain all mandatory fields or the layout of the invoice is different from the original layout, Basware rejects the invoice. Basware may also reject the invoice may, if it is sent from an unregistered email address or if the invoice attachments do not meet the requirements of the service. For more information, see what type of rejection messages the service sends out.

### **How can I change the layout of my invoice?**

Changing the layout of your invoices once they have been mapped can be done for an additional charge. Please contact [Basware Support](#) if you want to change your invoice layout, add a different language or make other changes to the invoice layout.

### **What happens if I send an invoice twice? Will it be delivered to my customer twice or do you perform duplicate checks?**

The service does not perform any checks for duplicate invoices. However, the receiver may have duplicate checks in place.

### **Which document types are supported in PDF e-Invoice for Sending service?**

The service supports, for example, the following invoice types:

- Invoices and credit notes
- Single page and multi-page invoices
- Invoices with multiple VAT/sales tax rates
- Invoices with additional charges (For example, freight, postage, insurance)
- Invoices with discounts on line or header level

It is important that you include all different invoice types in the test documents that you provide for the invoice data testing in the setup phase. If you need to make changes to the invoices types after the setup phase, please contact [Basware Support](#).

### **Can I send .ZIP files that contain the PDF invoice and its attachments?**

No, you can only send PDF files to the service.

### **Can I track the status of my invoices sent through the service on the Basware Network website?**

Yes, you can. For instructions, see [View invoice statuses](#).

### **What do I need to archive?**

Depending on the local regulations, you may need to archive, for example, the PDF invoice that you created or a paper printout of the PDF invoice.

### **What is the maximum size of a PDF e-invoice?**

The maximum size of the data files sent to Basware e-Invoice for Sending service is 10MB.

### **From where do I receive a user account to the Basware Network website?**

Basware provides you with user IDs during the setup phase. You can ask for more user IDs from the following email address: [directory.admin@basware.com](mailto:directory.admin@basware.com).

### **Where can I find more information about the service?**

You can find additional information about the service in [Basware Knowledge Base](#).

## Appendix

# A

## Attachment policy

- 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.

**Table 1: Examples of attachment filenames**

Attachments	Valid	Notes
<ul style="list-style-type: none"> <li><code>some.pdf</code></li> <li><code>another.pdf</code></li> <li><code>attachment_for_some.pdf</code></li> <li><code>attachment_for_another.pdf</code></li> </ul>	YES	<ul style="list-style-type: none"> <li>This message contains two business documents, <code>some.pdf</code> and <code>another.pdf</code></li> <li>This message also contains two attachments linked to the two business documents:                             <ul style="list-style-type: none"> <li><code>attachment_for_some.pdf</code> will be linked to <code>some.pdf</code></li> <li><code>attachment_for_another.pdf</code> will be linked to <code>another.pdf</code></li> </ul> </li> </ul>
<ul style="list-style-type: none"> <li><code>some.pdf</code></li> <li><code>another.pdf</code></li> <li><code>an_attachment.pdf</code></li> </ul>	NO	<ul style="list-style-type: none"> <li>This message contains two business documents, <code>some.pdf</code> and <code>another.pdf</code></li> <li>This message contains a single attachment, <code>an_attachment.pdf</code>, but the attachment is not linked to either of the business documents.</li> </ul>

Attachments	Valid	Notes
<ul style="list-style-type: none"> <li>• <code>some.pdf</code></li> <li>• <code>another.pdf</code></li> </ul>	YES	<ul style="list-style-type: none"> <li>• This message contains two business documents, <code>some.pdf</code> and <code>another.pdf</code></li> <li>• This message contains no attachments linked to the business documents</li> </ul>
<ul style="list-style-type: none"> <li>• <code>document_without_attachment.pdf</code></li> </ul>	NO	<ul style="list-style-type: none"> <li>• The single file contains the keyword <code>attachment</code> and the service considers this to be a business document attachment</li> <li>• There is no business document that the business document attachment could be linked to</li> </ul>
<ul style="list-style-type: none"> <li>• <code>document.tif</code></li> </ul>	NO	<ul style="list-style-type: none"> <li>• There are no business documents or business document attachments in PDF format</li> <li>• The service will ignore attachments in <code>.tif</code> format</li> </ul>
<ul style="list-style-type: none"> <li>• <code>document.pdf</code></li> <li>• <code>some_attachment.pdf</code></li> <li>• <code>another_attachment.pdf</code></li> <li>• <code>body.html</code></li> </ul>	YES	<ul style="list-style-type: none"> <li>• This message contains a single business documents, <code>document.pdf</code></li> <li>• This message also contains two business document attachments, <code>some_attachment.pdf</code> and <code>another_attachment.pdf</code>, that will automatically be linked to the single business document</li> <li>• The service will ignore and discard the file <code>body.html</code></li> </ul>

If you do not follow the attachment policy when you send business documents, the service will reject your message. The service will then send you a notification telling you that your message has been rejected. You must then make any necessary corrections to the message and send it to the service again.



Line level capture requirements	FI	SE	NO	DK	NL	UK	FR	GER	PT	ES	US	PL	BE	SUI	AT	ITA	LV	Generic
Row Number	*	*	*	*	M	*	*	*	*	*	*	*	M	*	*	*	*	*
Delivery Address	*	*	*	*	*	*	*	*	*	*	M	*	*	*	*	*	*	*
Article ID of the goods or services	*	*	*	*	M	*	*	*	*	*	*	*	M	*	*	*	*	*
Description/nature of the goods or services	M	*	*	M	M	M	M	M	M	M	M	M	M	M	M	M	M	*
Quantity of the goods supplied or the extent and nature of the services rendered	M	*	*	M	M	M	M	M	M	M	M	M	M	M	M	M	M	*
OrderNumber	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
Price per unit (excluding VAT)	M	*	*	M	M	M	M	M	M	M	*	M	M	*	*	M	M	*
Total (NET)	*	*	*	*	M	M	M	M	M	M	*	*	M	M	M	M	M	*
Vat %	*	*	C	M	M	*	M	M	M	M	*	*	M	M	M	M	M	*
Vat amount	*	*	*	*	M	*	M	M	M	M	*	*	M	M	M	M	M	*
Total (Gross)	*	*	*	*	M	*	*	*	*	*	*	*	M	M	*	*	*	*
Any discounts or rebates, not included in the unit price	*	*	*	*	*	*	*	*	*	*	M	*	*	*	*	M	M	*
Discount amount	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
Unit of measure (UOM)	*	*	*	*	M	*	*	*	*	*	*	M	M	*	*	*	M	*
Delivery Note Number	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
Customer Product Code	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*	*
<b>Summary</b>	<b>FI</b>	<b>SE</b>	<b>NO</b>	<b>DK</b>														



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Appendix

# C

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## Basware Message software

To start sending invoices with Basware Message software, you must first download it on your computer. The installation kit and Sender ID are sent to you by email when the setup phase of the service begins.

For instructions on installing and using Basware Message, see [Basware Knowledge Base](#).

According to your Windows version, please select the 32-bit or 64-bit installation kit version in the email you have received.



To determine whether your computer is running a 32-bit version or 64-bit version of the Windows 10 operating system:

1. Press and hold the Windows key and press I to open the Windows Settings view.
2. Click **System** > **About**.
3. Under **Device specifications**, check the **System type**.

---

## C.1 Install Basware Message



1. Open the download page in the email and click on the correct download link.
2. In the **File Download** window, double-click **Run** to select it.

The installation starts automatically after the file has been downloaded. The setup file contains the Basware Printer Driver and the Basware Message application. The Basware Message application is used to transfer printed files to the Basware Processing Centre.

3. Select the installation language
4. Read and accept the End User License Agreement.
5. Add the Sender ID that was provided to you in the email from Basware.
6. Select the installation type.

You can choose between the **Typical**, **Custom** and **Complete** installation types. The typical mode installs the most commonly used features and is recommended for most users.



If you need to run Basware Message as a service, you must select the **Custom** installation type.

---

The installation is complete after these steps have been completed. The installation adds a shortcut to the Basware Message software client on your desktop. The installation also creates a program group called **Basware** in the Start menu.

After the software has been installed, you can send invoices to Basware by choosing Basware Message as the printer. Send the test invoices by choosing "Run now" in the Message client software. You must

always use manual sending if you have not installed Basware Message as a service with automated sending.

If you want to send attachments or customize your sending settings, select **Configuration** in the Basware Message client. For more detailed instructions on Basware Message, see [Basware Knowledge Base](#).

## C.2 Sending invoices with Basware Message

To send invoices with Basware Message, simply create an invoice with a program of your choice, print the invoice and choose Basware Message as the printer. Basware will then convert the invoice into an e-invoice and send it into your customer's invoice processing system.

Make sure that your invoice includes the recipient's e-invoice address with the prefix **E:** (For example **E: 1234567** where 1234567 is the e-invoice address) or their email address.