



Quick Guide

Basware Invoice Key-In and PO Flip



1 Getting Started

1.1 Service Overview

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

- create and send electronic invoices
- receive electronic purchase orders. The service also notifies 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 Basware Invoice Key-In and PO Flip service. For detailed information, see the [Basware Network User Guide](#).

1.2 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.

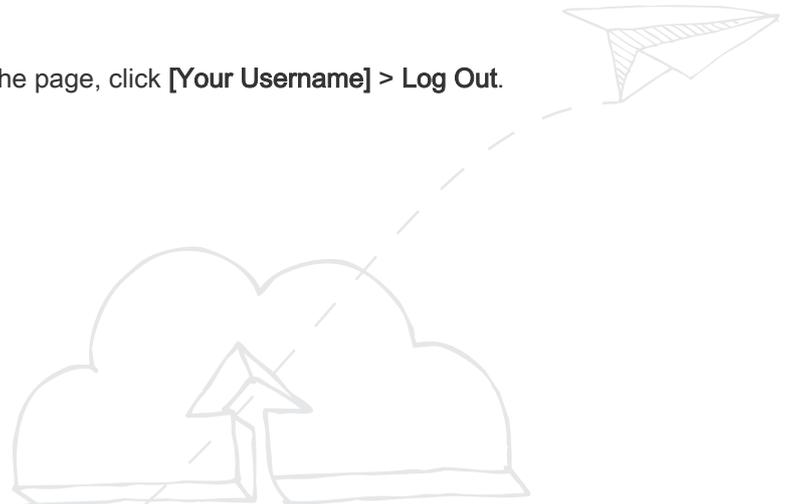


1. To open the service:

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**, **purchase orders** and **credit notes**. With Basware Network, you can:

- [Create an invoice](#)
- [Accept 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 form on top of the page to [find documents](#), and the page is divided into several tabs to help you browse your documents with ease.

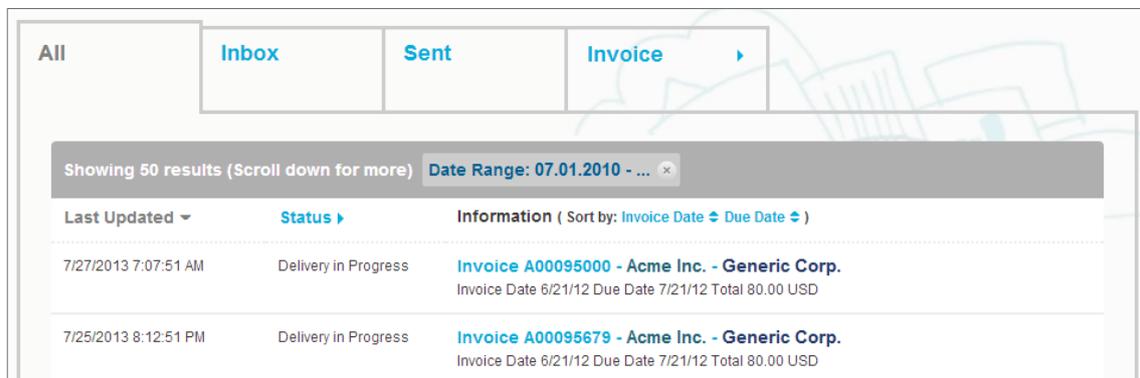


Figure 1: Documents page

- All tab** shows all the business documents that your organization has either sent or received.
- Inbox tab** shows all the business documents that your organization has received.
- Sent tab** 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 you want to see on this tab.

2.2 Create an invoice



1. On the **Documents** page, click **Create New > Invoice**.
2. Select a sender.
 - a. To change the sender, click **Change** under **Sender**.
 - b. Find the company you want to select as the sender and click **Select**.
3. Select a recipient.
4. Enter the invoice details.
5. Enter the line data.
6. Add invoice attachments.
7. Click **Send Invoice** to send the invoice to your customer.

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.

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 on 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

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 on 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. Set the **Promised Delivery Date**.
5. Click the line item to which you want to propose a change.
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 on a purchase order to open it.
2. Review the purchase order.
3. Click **Reject** to reject the purchase order.
The **Reject Purchase Order** popup opens
4. In the **Comments to buyer** field, add a comment to the buyer that describes why you have rejected the purchase order.
5. Click **Confirm** to reject the purchase order.
The purchase order is now set to *Rejected* status. Basware Network notifies the buyer that you have rejected their purchase order.

