Quick Guide to the Supplier Portal

"The fact that the transaction piece is taken care of and almost becomes invisible means you're talking to your customers about different things – you're talking about adding value to the relationship."

Janice Kite, UK eBusiness Manager, Johnson & Johnson
Supplier on the Basware Commerce Network

Suppliers are under increasing pressure to understand customer needs and make it easier to do business. Meanwhile their customers are implementing an increasing number of electronic initiatives to streamline their purchasing processes. Unfortunately, buyer-side solutions don't always address supplier-side challenges.

That's where Basware comes in.

To ensure you keep ahead of the game Basware offers you easy to use connectivity and content solutions in one environment. Free of charge. Our supplier solutions give you:

- single-point connectivity to access multiple buyers
- integration to your sales and finance systems, reducing manual data entry and double keying
- a single portal for entering catalogue content and publishing it to multiple buyers and marketplaces
- an online reporting system which shows you who's buying what and when

Basware's solutions are internet based, fully hosted, and security accredited. That means you can access your orders, manage your content, and keep on top of your customer relationships anywhere you want to, whenever you want to.

Manually processing paper invoices is labour intensive, time consuming, has high administrative costs and has an environmental cost. By utilising eInvoicing within the Basware Commerce Network it is possible to both reduce costs and environmental damage by eliminating paper consumption.

About This Guide

This quick guide is for Suppliers that have completed their registration on the Basware Commerce Network which encompasses:

- The **Government eMarketplace** (Zanzibar) - the eProcurement marketplace for the UK Public Sector including the Dynamic Marketplace.
- **xchangewales eTrading for Schools** - the eProcurement solution for publicly funded schools in Wales
- **xchangewales eTrading** - the eProcurement marketplace for the Welsh Public Sector
- **Procurement for Housing Marketplace** - the eMarketplace for Social Housing providers
- **National Police Procurement Hub** - the eMarketplace for all Police Forces in the UK and England

This guide will provide you with a brief overview of the Supplier Portal. The Supplier Portal will house all transactional documents you receive from your customers trading via the Basware Commerce Network. It will provide you with brief descriptions of the different elements of the system and how you can complete certain basic tasks.

Log into the Basware Commerce Network and select Supplier Portal from the left hand menu. You will see the screen below.

This will show what is waiting for your attention. The above shows 3 quotes not sent and 793 Orders not yet viewed.

Orders Not Yet Viewed
Click on the link for 'Orders not yet viewed'

On the left hand side you can use the drop down menus at the top to choose which documents you want to list. The right hand will show you the detail of the one selected.

You have the option of setting it out as a list (see above), in tree format (see below) or doing a search.
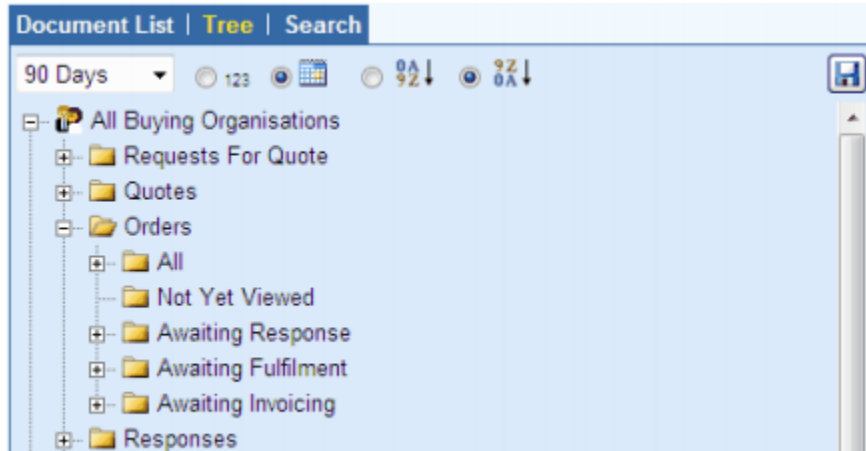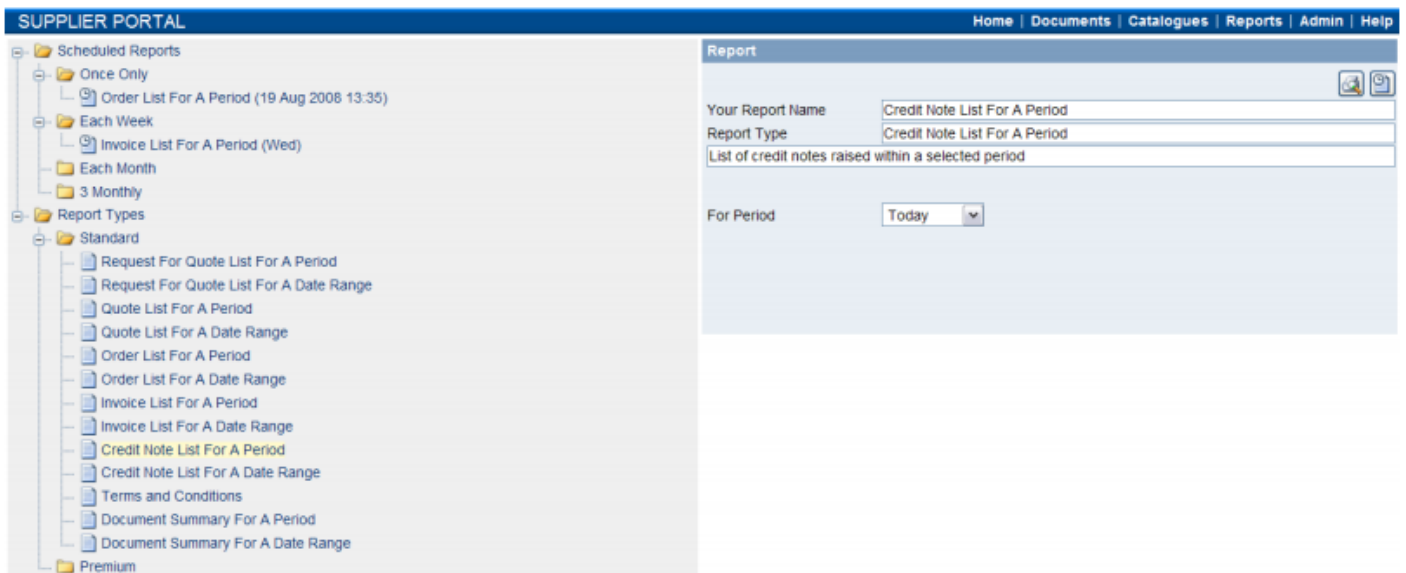
Reports

If you go to Reports this will bring up the following menu options:
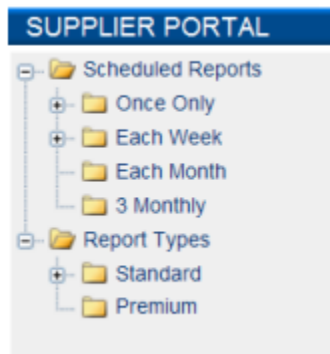
To create a report, go to Report Types > Standard and select the type of report you want to run. Information will appear on the right side of the screen.

Complete the information by selecting which period it should cover. Choose from the drop down menu. Once this is completed, click

to get a preview of what the report will look like and then click on   to arrange the schedule.

Here you need to add in the frequency of when you want this report to be run, at what time and who it should be mailed to.

If you select each week, some tick boxes for the day of the week will appear.
If you select each month, another box will appear requesting to what day of the month to run on.
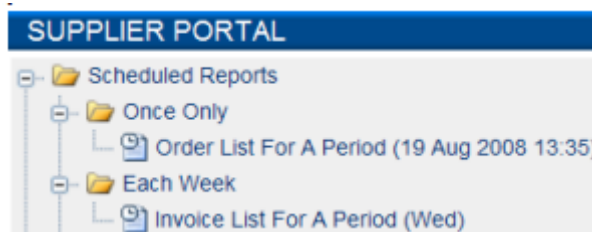3 monthly will also request the date.

If you decide that you don't want to go ahead then click on the   and this will cancel your request.

Once you have scheduled a report if you go back and select the appropriate menu selection for that report you should see it displayed as below.

Premium reports are optional value added reports that will be written specifically for the organisation.

Admin

Go to Admin > Company Admin from the top right menu bar.
Under the General tab you will see a screen similar to below:

It does continue down the page on the right.

This information is all about your company and information on Quotes, Invoices, Credit Notes etc. If you now select Addresses from the top left menu bar it will show the following screen:
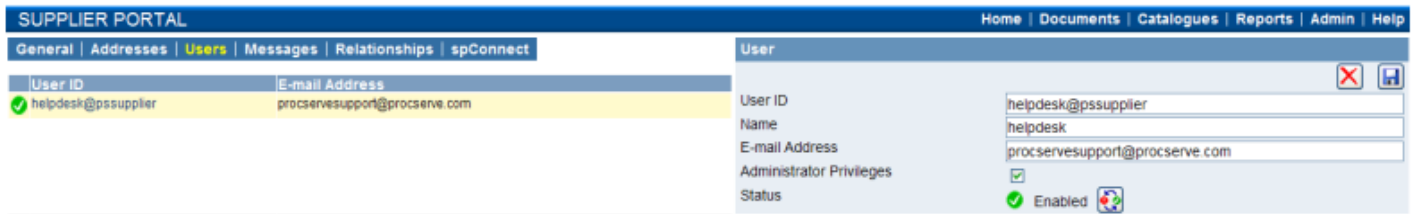
This is just your organisation address(es).
Now select Users on the top left menu bar and you will get a list of the users.

These details are not editable in this screen, you will need to refer to User management on the Home page
Next on the top menu bar is Messages.
This will be blank if there are no messages. To add a message click on
This will bring up the following screen on the right:
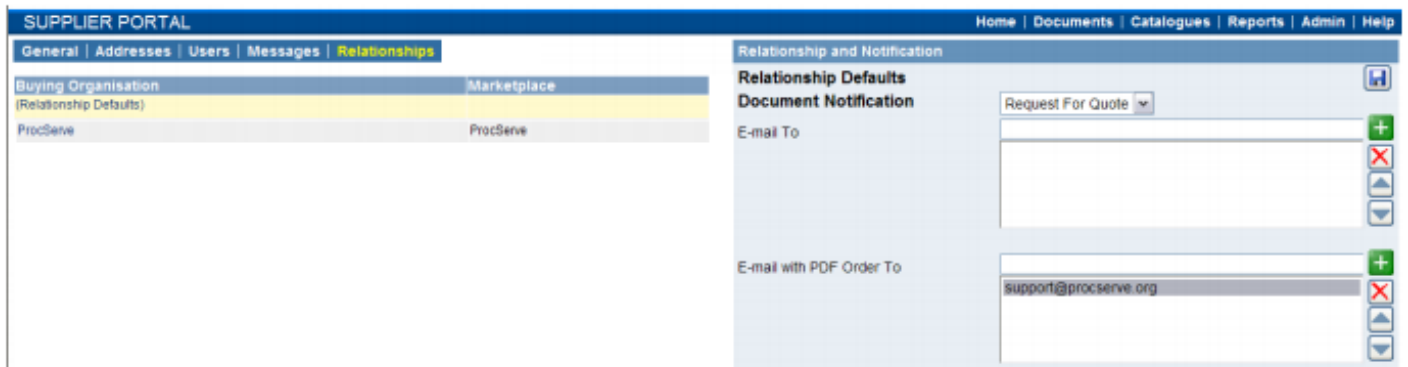
Complete the Message Title and put when you want it to start and stop being displayed. Then complete the message.
When you click on   it will save it and it will appear on the left.

If your Start Displaying Time is set in the future you will need to wait for this time before it appears on the left.

Now go to Relationships on the top menu bar:

Under the Relationships tab you will see a list of customers on the left hand side that you have received a transaction from.
Within this page you can set the Supplier Portal to email documents.
The relationship highlighted in yellow will be viewable on the right hand side. The Relationship default setting will include all Buying Organisations you have a relationship with.

Select the Document Notification from the drop down list.

You are able to created Order emailing settings from here. If you require an document notification, type an email address in the text box next to 'email to' and select

Once the email address drops into the box below select ▯ to save it.

If you require a PDF document via email, type an email address in the text box next to 'email with PDF order to' and select

Once the email address drops into the box below select ▯ to save it.

For any further information please contact the service desk on:

0845 603 2885

support@procserve.com

About Basware:

Basware is the global leader in providing purchase-to-pay and e-invoicing solutions in the world of commerce. We empower companies to unlock value across their financial operations by simplifying and streamlining key financial processes. Our Basware Commerce Network, the largest open business network in the world, connects 1 million companies across 100 countries and enables easy collaboration between buyers and suppliers of all sizes. Through this network, leading companies around the world achieve new levels of spend control, efficiency and closer relations with their suppliers. With Basware, businesses can introduce completely new ways of buying and selling to achieve significant cost savings and boost their cash flow.

Find out how Basware helps money move more easily and lets commerce flow at www.basware.com.

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