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Basware Guardian for AP Service Description

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1 About Guardian for AP

Guardian for AP provides users with complete visibility into their workload, allowing real-time tracking of a document's status. The service also enables customers to proactively manage their exception-handling process before invoices enter the AP workflow.

Guardian for AP is tailored for customers receiving invoices.

1.1 Benefits

Guardian for AP provides the following benefits:

- Invoicing is streamlined across all departments. This minimizes manual work, reduces errors, accelerates processing, and allows teams to focus on more strategic tasks.
- Accounts payable and accounts receivable teams can easily view pending invoices, with clear compliance indicators ensuring secure and accurate processing.
- Full visibility and advanced compliance dashboards help accounts payable and accounts receivable teams align with legal standards and avoid costly penalties.
- Spam and junk invoices are automatically filtered, enabling teams to concentrate on genuine and relevant issues.
- Invalid invoices are flagged instantly, and built-in collaboration tools assist in resolving them quickly with customers.
- Documents are automatically checked to ensure compliance with local laws and regulations, which reduces legal risks.
- CFOs gain real-time visibility into tax and compliance risks, helping them stay ahead of potential issues. Compliance checks and controls provide CFOs with peace of mind by catching errors early and maintaining audit readiness.
- The service is easy to set up and configure, and has a user-friendly user interface. Users can easily track the status of invoices, filter data, and generate reports.
- Proactive communication and efficient invoice handling enhance customer relationships and ensure timely payments, leading to greater satisfaction for customers and suppliers.

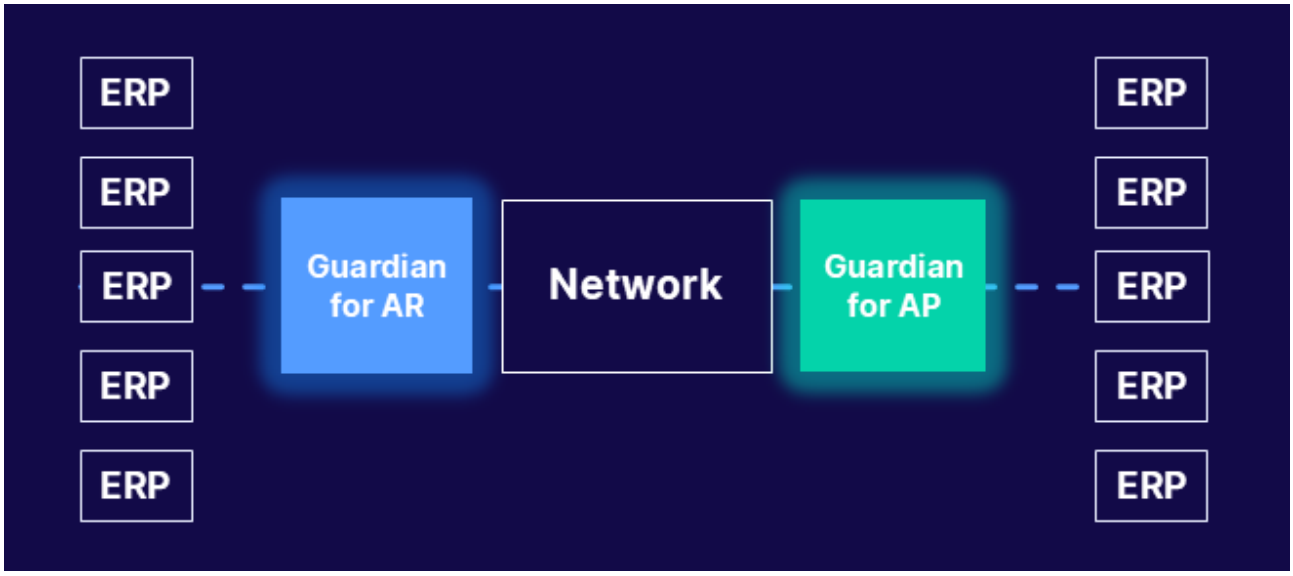
1.2 Related services

Guardian for AP can be extended with Basware Insights, which provides data-driven recommendations to help users gain actionable insights faster. By offering new ways to interact with process data, Basware Insights delivers deeper visibility into various aspects of the customer's accounts payable process. For more information, refer to Basware Insights Service Description.

Guardian for AP supports extending the service to full AP automation, incorporating features such as order matching and approval workflows.

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1.3 Process overview



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2 Capabilities

Guardian for AP has the following features:

Compliance controls	Customers can enforce internal policies and regulatory standards through built-in, configurable compliance checks and audit trails. This minimizes the risk of non-compliance and supporting governance requirements.
Intelligent exception handling	Invoice discrepancies or anomalies are automatically detected, flagged, and managed for resolution. This reduces delays and manual intervention while preserving process integrity.
Supplier collaboration	Customers can enable secure, real-time communication and document sharing with suppliers to expedite dispute resolution, reduce back-and-forth exchanges, and strengthen vendor relationships.
Document classification	Non-invoice files, such as statements and reminders, can be classified into appropriate categories. This enhances the value of invoice-related files and reduces the manual effort required to categorize them.

Guardian for AP filters and enriches invoices received from the Basware Network or third-party providers via the Basware AP Connector. By default, Guardian for AP does the following:

- Ingestion and verification
- Enrichment
- Document filtering
- Document classification
- Supplier collaboration
- Provide visibility and control for the accounts payable team
- Transfer invoices to the ERP system

2.1 Ingestion and verification

Invoices are ingested into the service via the Basware Network. Users also have the option to create invoice documents manually. Upon arrival in the system, invoices go through a verification process where the data content is checked against a set of business rules. Successfully verified invoices continue through the process.

The set of business rules can be configured by the customer. For example, a rule can identify duplicate invoices and exclude them from processing.

Different types of verification are available. Guardian for AP provides content-level verification, including:

- Verifying the content of the invoice header or line fields to ensure compliance with specific criteria. For example, purchase order numbers must meet certain length requirements and begin with "PO".
- Verifying the total invoice amounts concerning gross, net, and tax amounts.

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- Tax verification from third parties.

2.2 Enrichment

Guardian for AP can enrich incoming invoice data in the following ways:

- Manual enrichment. An AP clerk can do the following:
  - Correct errors found during verification.
  - Add attachments and images to the invoice before transfer.
  - Enhance the invoice header and line fields by manually adding details or selecting from a list. For example, the AP clerk can select a purchase order from a list.
- Third-party enrichment. Additional fields can be added to an invoice that has been verified with third parties.

2.3 Document filtering

Document filtering enables users to create rules that automatically exclude irrelevant or invalid documents from entering their accounts payable system. The following filtering options are available:

- Non-invoices
- Duplicate invoices

Document filtering rules

Users can create rules with the following information:

- Rules can be created at the company level in Data management, and can be applied to subordinate companies.
- Rules can be named for easy identification.
- Rules can be marked as active or inactive.
- The number of days after which the automatic action takes place can be configured. The available options are: 1 to 7 days, 14 days, or 30 days.

Document filtering actions

The following actions can be performed on the filtered documents:

- Automatic removal
- Automatic dispute
- No automatic action

Guardian for AP can send an email to the supplier to notify them of the action taken, based on user selection.

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2.4 Document classification

The service includes an intelligent document classification service that automatically identifies and categorizes non-invoice documents—such as statements, reminders, and more. This capability streamlines routing and handling, reducing the need for manual intervention and enabling faster, more efficient processing.

2.5 Visibility and control

The service provides visibility and control over all invoices and related documents to all users. A dedicated user interface is provided for AP clerks to manage invoices. Advanced workload management creates dedicated work queues for AP clerks, so they can focus their time.

Document visibility is controlled by user permissions defined by the customer.

2.6 Supplier collaboration

- Supplier collaboration on a single invoice: Guardian for AP includes a supplier chat function, enabling users to initiate conversations with suppliers directly within the system, at any point in the invoice lifecycle. Suppliers can join the chat through a simple verification process and respond to questions or provide additional details. The chat keeps discussions organized and ensures a clear audit trail for future reference.
- Supplier collaboration over email: Guardian for AP enables integration of the buyer's shared Accounts Payable (AP) email address directly into the platform. This provides a centralized location for managing supplier communications related to invoices, enhancing visibility, control, and efficiency in handling invoice-related queries.
- Supplier self-service view: Guardian for AP allows buyers to grant suppliers access to a self-service view for all invoices. Through this capability, suppliers can register and view all invoices they have submitted to the buyer, improving transparency, reducing dependency on buyer support, and fostering smoother collaboration.

2.7 Compliance center

Compliance center provides a centralized view of overall compliance across the invoice process. It offers visibility into business and tax compliance, includes country-level breakdowns, and provides a compliance score.

2.8 Integrations

Guardian for AP offers standard integration with REST API. Through the Basware AP Automation and Procurement service, customers can connect to multiple ERP systems, cloud ERP solutions, or traditional on-premise systems. In addition to standard integrations, Basware provides customer-specific integration scenarios based on ERP-specific requirements. For more information on standard integration, refer to

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Basware API in the Standard Integration Methods section of the Basware AP Automation and Procurement Integration Service Description.

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3 Terms and conditions

3.1 Implementation

Initial setup

The initial setup is done by Basware Professional Services. The customer defines the required setup with Professional Services. For example: invoice content values, such as invoice coding dimensions, and invoice processes, such as non-PO invoice process.

The scope statement contains process definitions, invoice content definitions, and integrations to other systems. The service is configured according to the definitions of the customer. A hypercare period starts after the Go-Live. During this period, Basware may perform additional fine-tuning of the service. Standard monitoring of the service starts after the hypercare period.

Adjusting the service setup

Changes to the initial setup are often needed to fine-tune the processes to achieve touchless invoice processing. The add-on services, like Basware Insights, are a source for the fine-tuning activities. These changes to the setup may require a Change Request for Professional Services.

Implementation project deliverables

The service is set up in the customer system and it has been tested successfully. The customer is instructed on how to report possible quality issues to Basware.

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