**Wave Onboarding Checklist**

Below are the onboarding steps for Access Point, SMP and corporate participants

onto the BPC’s E-invoice Exchange Framework. As part of you participation in the market pilot we ask that you please provide us any feedback on the below steps, tools and resources at [BPCMarketPilot@mpls.frb.org](mailto:BPCMarketPilot@mpls.frb.org).   
  
**Access Point & SMP Checklist**

|  |  |  |
| --- | --- | --- |
|  | **Check List Item** | **Participant Process** |
|  | Sign the BPC Market Pilot Project Participant Non-Disclosure Agreement | * Email the signed NDA document to [BPCMarketPilot@mpls.frb.org](mailto:BPCMarketPilot@mpls.frb.org) |
|  | Provide a valid Participant ID that adheres to the [BPC Identifier Policy](https://drive.google.com/file/d/1UiteyDHO96HIspyvNJrMBFAUl3F-pDCM/view?usp=sharing) | * Enter the following information into the [Market Pilot Wave Participant Information – Google Sheets](https://docs.google.com/spreadsheets/d/1h7okY7AeShHJ0s3Qym4YvqFV_4uR6TzRYD4X8mZdqYA/edit#gid=0)   + Participant ID   + Qualified SMP URL and other details regarding your participation |
|  | Register with a SMP, and provide a qualified URL from the SMP provider | * Contact an SMP listed in the [[Market Pilot Wave Participant Information – Google Sheets](https://docs.google.com/spreadsheets/d/1h7okY7AeShHJ0s3Qym4YvqFV_4uR6TzRYD4X8mZdqYA/edit#gid=0)](https://docs.google.com/spreadsheets/d/1h7okY7AeShHJ0s3Qym4YvqFV_4uR6TzRYD4X8mZdqYA/edit#gid=0) to register. * Enter the qualified SMP URL into [Market Pilot Wave Participant Information – Google Sheets](https://docs.google.com/spreadsheets/d/1h7okY7AeShHJ0s3Qym4YvqFV_4uR6TzRYD4X8mZdqYA/edit#gid=0) spreadsheet. |
|  | Register with an SML | * Email the Market Pilot SML to register:   + Kenneth Bengtsson     - [bdxhub@gmail.com](mailto:bdxhub@gmail.com) |
|  | Obtain certificate from Certificate Authority Custodian | * Email the Market Pilot CAC to request a certificate:   + Marine Net LLC -     - [Jim.Taylor@MarineNetLLC.com](mailto:Jim.Taylor@MarineNetLLC.com) * CAC sends confirmation email to participant along with the certificate and cc’s [BPCMarketPilot@mpls.frb.org](mailto:BPCMarketPilot@mpls.frb.org) |
| ☐ | Connect to network and begin exchanging invoices | * Participant utilizes Tools and Resources for reference, testing, collaboration, and reporting |
| ☐ | Access Points - Maintain the list of C1s (corporates sending e-invoices) and C4s (corporates receiving e-invoices) upon onboarding any new end points to the framework | * Enter the following information into the C1, C4 Participants List tab in the [Market Pilot Wave Participant Information – Google Sheets](https://docs.google.com/spreadsheets/d/1h7okY7AeShHJ0s3Qym4YvqFV_4uR6TzRYD4X8mZdqYA/edit#gid=0)   + Corporate Name   + Contact Name (optional)   + Contact email (optional)   + Participant ID   + Invoices – Sending, Receiving, or Both |

**Corporate Checklist (Not for corporates participating through their providers)**

|  |  |  |
| --- | --- | --- |
|  | **Check List Item** | **Participant Process** |
| ☐ | Sign the BPC Market Pilot Project Participant Non-Disclosure Agreement | * Email the signed NDA document to [BPCMarketPilot@mpls.frb.org](mailto:BPCMarketPilot@mpls.frb.org) |
| ☐ | Provide a valid Participant ID that adheres to the [BPC Identifier Policy](https://drive.google.com/file/d/1UiteyDHO96HIspyvNJrMBFAUl3F-pDCM/view?usp=sharing) | * Enter the following information into the [Market Pilot Wave Participant Information – Google Sheets](https://docs.google.com/spreadsheets/d/1h7okY7AeShHJ0s3Qym4YvqFV_4uR6TzRYD4X8mZdqYA/edit#gid=0)   + Participant ID |

**Market Pilot Tools and Resources**

|  |  |
| --- | --- |
| **Tool or Resource** | **Link** |
| **Market Pilot APPROVED BPC Specifications**   * Find the Market Pilot approved versions of network policies, technical specifications, the semantic model, semantic model validation artifacts etc.   + BPC Semantic Model v1.0   + FINAL – BPC AS4 Profile Version 1.0   + FINAL – BPC SML Profile Version 1.0   + FINAL – BPC SMP Profile Version 1.   + FINAL – BPC XHE Profile Version 1.0   + FINAL – BPC Certificate Policy 1.0   + FINAL – BPC Identifier Policy Version 1.0 | [BPC-Exchange-Framework/BPC-Market-Pilot: Approved specifications and related issue tracking for the BPC Market Pilot. (github.com)](https://github.com/BPC-Exchange-Framework/BPC-Market-Pilot)  These specifications, along with draft supporting documentation can also be found here: <https://drive.google.com/drive/folders/1kO2lNOd6gCNwK-H06DEqeYw3sdUBFCSb> |
| **Access Point and SMP Test Plans**   * Use these test plans to ensure proper functioning of network components. See the following tabs:   + Access Point Test Plan – Sending   + Access Point Test Plan – Receiving   + SMP Test Plan | <https://docs.google.com/spreadsheets/d/1ejkMDgeBAz3kRiEhhkYJBYbCEAVJ3OnD/edit?usp=sharing&ouid=107318772792262222770&rtpof=true&sd=true> |
| **BPC Open-source Discovery and Delivery Tools Documentation and Repository** | [E-Invoice Onboarding Toolkit (bpc-exchange-framework.github.io)](https://bpc-exchange-framework.github.io/e-Invoice-Onboarding-Toolkit/) |
| **BPC Slack Invitation**   * Use the *#wave2discussion-troubleshooting* Slack channel to seek guidance and troubleshooting assistance from other Wave participants | <https://join.slack.com/t/bpc-einvoicing/shared_invite/zt-dkf8739h-3tUSHaEj~anmyJwZzpAqBQ> |
| **BPC Issue Tracking Github Repository**   * Capture and track status of technical issues during the Wave. * It is recommended that you first raise an issue in Slack for input. * If issue cannot be resolved, log it in the Github repository. | [BPC-Exchange-Framework/BPC-Market-Pilot: Approved specifications and related issue tracking for the BPC Market Pilot. (github.com)](https://github.com/BPC-Exchange-Framework/BPC-Market-Pilot) |