SUPPLIER INVOICE WORKFLOW
EINVoice
Efficient automated workflow

THOMAS PETERSON – SENIOR ADVISOR - FINANCIALS
LEIF JOHANSSON – BUSINESS SOLUTIONS CONSULTANT
AGENDA – SUPPLIER INVOICE WORKFLOW

- How can we benefit from Supplier Invoice Workflow?
- Company
- Supplier
- Authorization Rules
- Purchase Order and Supplier Invoice Process
- Improved Process Flows
- Remote Authorization
SUPPLIER INVOICE WORKFLOW
WHY DO WE NEED A BETTER PROCESS

Need a better / more cost-effective way of handling supplier invoices:

- Handling supplier invoices is one of the most time consuming and costly administrative processes in a company or an organization today
- Each invoice can cost USD 50 or more to handle
- Cumbersome in a decentralized organization
- Risk for late payments and unnecessary interest costs
- Risk for poor control
- Undefined or unclear authorization rules
- Hard to find old invoices
DOCUMENT AUTOMATION

- Replaces manual handling of all documents
- Increases efficiency
- Saves money
- Saves time
- Creates flexibility and dynamics
- Increases data quality and enhances the quality of working processes
- Improves security and traceability
BUSINESS DRIVERS

Companies looking for solutions to facilitate:

- New efficient organization models, e.g. networks
- Service centers
- Outsourcing projects
- Electronic business and information exchange
- Compliance, e.g. SOX
ACCOUNTS PAYABLE

IFS PURCHASING
- PO Receipts
- PO Milestones
- Sub Contract Applications

IFS Invoice

IFS Payment

Enter Supplier Invoice

Manual Payments

Payment via file, document or checks

Automatic Payments

Queries

Reports

GENERAL LEDGER

ACCOUNTING RULES
### COMPANY SETUP

**POSTING PROPOSAL**

<table>
<thead>
<tr>
<th>Company</th>
<th>Name:</th>
<th>Association No:</th>
<th>Created By:</th>
</tr>
</thead>
<tbody>
<tr>
<td>24</td>
<td>My Company 24</td>
<td>C024</td>
<td>ERAN</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
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<th></th>
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</thead>
<tbody>
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<td></td>
</tr>
</tbody>
</table>

#### Posting Parameters

- [ ] Create Posting at Invoice Entry
- [ ] Same No Preliminary and Final Supplier Invoice
- [ ] Same Date Preliminary and Final Supplier Invoice
- [x] Use Posting Proposal

#### Invoice Payment Reference No

- **Customer Invoice**
  - Creation Method: Not Used
- **Supplier Invoice**
  - Validation Method: Not Used

#### Misc Parameters

- Planned Pay Date Calc.
  - Base:
    - Pay, Term Base Date
    - Supplier
- Unique Supp Inv No Per:
- Supplier Invoice Authorization Only by Separate Function
- [ ] Cash Discount Based on Gross Amount
- Set Invoice Date to Current Date When Printing Customer Invoices
- [x] Print Advance Payments information on Customer Invoice

#### Credit

- Company Credit Limit:

**Page Posting:**

---

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### Company Setup

**PO Matching**

<table>
<thead>
<tr>
<th>Company</th>
<th>Name</th>
<th>Association No</th>
<th>Created By</th>
</tr>
</thead>
<tbody>
<tr>
<td>24</td>
<td>My Company 24</td>
<td>CO24</td>
<td>ERAN</td>
</tr>
</tbody>
</table>

#### PO Matching Parameters

**Supplier on PO Line(s) not equal to Supplier on Invoice:**
- Match All

**Posting Authorization:**
- Automatic Authorization

#### Tolerance Parameters

- **Tolerance %:** 1.00
- **Tolerance Amount:** 10.00
- **Tolerance Currency:** USD

- Create Tolerance Posting according to Posting Control
### Company Setup

**Posting Proposal**

<table>
<thead>
<tr>
<th>Company</th>
<th>Name:</th>
<th>Association No:</th>
<th>Created By:</th>
</tr>
</thead>
<tbody>
<tr>
<td>24</td>
<td>My Company 24</td>
<td>CO24</td>
<td>ERAN</td>
</tr>
</tbody>
</table>

#### Document Parameters

- **Invoice Image Document Class:** INVOICE
- **Invoice Image Document Prefix:**
- **Attachment Document Class:** INVOICE
- **Attachment Document Prefix:**
## COMPANY SETUP
### SUPPLIER INVOICE WORKFLOW

<table>
<thead>
<tr>
<th>Company</th>
<th>Name:</th>
<th>Association No:</th>
<th>Created By:</th>
</tr>
</thead>
<tbody>
<tr>
<td>24</td>
<td>My Company 24</td>
<td>CO24</td>
<td>ERAN</td>
</tr>
</tbody>
</table>

|---------|---------|--------------|---------------|-----------|------------------|---------|--------------|---------|---------------------------|

<table>
<thead>
<tr>
<th>General</th>
<th>Default Invoice Types</th>
<th>Tax Information</th>
<th>PO Matching</th>
<th>Document Management</th>
<th>Jinsui Invoice Information</th>
<th>Supplier Invoice Workflow</th>
</tr>
</thead>
</table>

- **Company**
  - **Document Management**

  - **Authorization Parameters for Posting Proposal**
    - **Authorizer Authentication:**
      - No Authentication
    - **Authorization Routing:**
      - Use Parallel Authorization

  - **Two Authorizer Parameters**
    - **Two Authorizers Required**
    - **Amount that Requires Two Authorizers:** 5000.00
    - **Ledger Assistant:**
      - ERAN

- **Inherit Authorizer(s) from Purchase**
  - **Inherit Requisitioner as Acknowledger**

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# Authorization Rules

## Authorizer Assigning Rules

<table>
<thead>
<tr>
<th>Assigning Rule ID</th>
<th>Description</th>
<th>Priority</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADMIN1</td>
<td>Administrative Cost Centers to Admin1 Group</td>
<td>246</td>
<td>Active</td>
</tr>
</tbody>
</table>

### General
- Suppliers
- Invoice Recipients
- Code Parts

### Routing Rule ID
- Admin 1

### Maximum Amount
- 10000.00

- Apply regardless of supplier
- Apply Regardless of Invoice Recipient
- Apply Regardless of Code Parts

## Authorizer Assigning Rules

<table>
<thead>
<tr>
<th>Assigning Rule ID</th>
<th>Description</th>
<th>Priority</th>
<th>Status</th>
</tr>
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<tbody>
<tr>
<td>ADMIN1</td>
<td>Administrative Cost Centers to Admin1 Group</td>
<td>246</td>
<td>Active</td>
</tr>
</tbody>
</table>

### General
- Suppliers
- Invoice Recipients
- Code Parts

## Authorization Routing Rules

<table>
<thead>
<tr>
<th>Routing Rule ID</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADMIN1</td>
<td>Administrative Managers</td>
</tr>
</tbody>
</table>

### Sequence
- 1

### Authorizer ID
- ERAN

### Name
- Eric Andersson

### Role
- Authorizer

## Substitutes

<table>
<thead>
<tr>
<th>Substitute ID</th>
<th>Name</th>
<th>Valid From</th>
<th>Valid Until</th>
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</table>
SUPPLIER INVOICE ENTRY
SUPPLIER SENT INVOICE FOR LINE 1 ONLY

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td>1000.00</td>
</tr>
</tbody>
</table>

PO Ref: P1000CE
Invoice Identity: LINE 1 ONLY
Invoice Date: 3/14/2011
Due Date: 3/14/2011
Payment Terms: Due Immediately
Gross Amount: 1000.00
Net Amount: 1000.00

Authorization: Posting Proposal Exists

Balance: -1000.00
Voucher Text: Synthex
### Posting Proposal

**PO Ref:** 20004  
**Sub Contract Ref:** 20004  
**Supplier:** Synthes  
**Gross Amount:** 1000.00  
**Currency:** USD  
**Net Amount:** 1000.00  
**Tax Amount:** 0.00

**Notes:** Proposal Authorized

**Line ID**  
<table>
<thead>
<tr>
<th>Line ID</th>
<th>Delivery Type</th>
<th>Income Type</th>
<th>Tax Code</th>
<th>Multiple Tax Lines</th>
<th>Tax (%)</th>
<th>Tax Method</th>
<th>Tax Received</th>
<th>Gross Amount</th>
<th>Net Amount</th>
<th>Tax Amount</th>
<th>Tax Amount in Acc Curr</th>
<th>Withheld Tax Amount</th>
<th>Voucher Text</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>0.00</td>
<td>1000.00</td>
<td>1000.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>Synthes</td>
</tr>
</tbody>
</table>

**Proposal Status:** Auth  
**Status Detail Info:** Posting proposal is fully authorized and ready for final posting.

**Balance:** 0.00  
**Balance in Acc Curr:** 0.00  
**Status Message ID:** AUTH  
**Voucher Text:** Synthes

**Account:**  
<table>
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</table>
## Posting Authorization

### 24 - Posting Proposal

<table>
<thead>
<tr>
<th>Seq</th>
<th>Voucher Company</th>
<th>Authorizer</th>
<th>Name</th>
<th>Role</th>
<th>Status</th>
<th>Amount in Acc Curr</th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>ERAN</td>
<td>Eric Andersson</td>
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<td>1000.00</td>
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</table>

### Authorize Details

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<thead>
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<th>Seq</th>
<th>Voucher Company</th>
<th>Authorizer</th>
<th>Name</th>
<th>Role</th>
<th>Status</th>
<th>Amount in Acc Curr</th>
<th>Date Created</th>
<th>Date Changed</th>
<th>User ID</th>
<th>User Name</th>
<th>Approval Rule Source</th>
<th>Approval Rule</th>
<th>Automatically Authorized</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1</td>
<td>ERAN</td>
<td>Eric Andersson</td>
<td>Authorized</td>
<td>Authorized</td>
<td>1000.00</td>
<td>3/14/2011</td>
<td>3/14/2011</td>
<td>ERAN</td>
<td>Eric Andersson</td>
<td>Financials</td>
<td>ADMIN1</td>
<td>Yes</td>
<td></td>
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</tbody>
</table>
EXAMPLE 2 – INVOICE PRIOR TO RECEIPT
# PURCHASE ORDERS

## CONTINUATION FOR LINE 2 AND 3

### Purchase Order - P100005

<table>
<thead>
<tr>
<th>Line No</th>
<th>Description</th>
<th>Quantity</th>
<th>Purch UoM</th>
<th>Planned Receipt Date</th>
<th>Planned Delivery Date</th>
<th>Wanted Delivery Date</th>
<th>Promised Delivery Date</th>
<th>Site</th>
<th>Price/Curr</th>
</tr>
</thead>
</table>

**Pre Posting**

**Line 1**

**Line 2**

**Line 3**
SUPPLIER INVOICE ENTRY
SUPPLIER SENT INVOICE FOR LINE 1 ONLY

<table>
<thead>
<tr>
<th>Line ID</th>
<th>Delivery Type ID</th>
<th>Income Type Identification</th>
<th>Tax Code</th>
<th>Multiple Tax Lines</th>
<th>Tax (%)</th>
<th>Tax Method Received</th>
<th>Gross Amount</th>
<th>Net Amount</th>
<th>Tax Amount</th>
<th>Tax Amount in Acc Curr</th>
<th>Withheld Tax Amount</th>
<th>Vendor ID</th>
<th>Status</th>
<th>Currency</th>
<th>Currency Rate</th>
<th>Authorizer ID</th>
<th>Due Date</th>
<th>Plan Pay Date</th>
<th>Notes</th>
<th>Advance Invoice</th>
<th>Authorize for Payment at Final Posting</th>
<th>Pre-posting</th>
<th>Posting Proposal Exists</th>
<th>Received Attachments</th>
<th>View Invoice Attachment</th>
<th>View Vouchers</th>
<th>Purchasing</th>
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<tbody>
<tr>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>2500.00</td>
<td>2500.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>200004</td>
<td>Preliminary</td>
<td>USD</td>
<td>1.000000</td>
<td>*</td>
<td>3/14/2011</td>
<td>3/14/2011</td>
<td></td>
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<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## POSTING PROPOSAL

UNBALANCED – NO RECEIPT TO MATCH

### Posting Information

<table>
<thead>
<tr>
<th>Proposal Status:</th>
<th>Unbalance</th>
</tr>
</thead>
</table>

| Balance:        | -2500.00  |
| Status Info:    | -2500.00  |
| Code Part:      | 20004     |

<table>
<thead>
<tr>
<th></th>
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<tbody>
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</tr>
</tbody>
</table>
## Purchase Order Receipt

LINE 2 AND 3 ARE RECEIVED

<table>
<thead>
<tr>
<th>Line No</th>
<th>Description</th>
<th>Quantity</th>
<th>Status</th>
<th>Price/Curr</th>
<th>Purch UoM</th>
<th>Planned Receipt Date</th>
<th>Planned Delivery Date</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Admin Related Costs</td>
<td>1</td>
<td>Closed</td>
<td>1000.00</td>
<td>EA</td>
<td>3/9/2011</td>
<td>3/9/2011</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Purchase Costs</td>
<td>1</td>
<td>Closed</td>
<td>500.00</td>
<td>EA</td>
<td>3/9/2011</td>
<td>3/9/2011</td>
<td></td>
</tr>
</tbody>
</table>
MATCH INVOICE WITH NEW PO RECEIPT

TYPICALLY THIS IS A SCHEDULED JOB

This dialog will enable the user to select a method that Match Invoices with new PO Receipts.

If OK button is pressed, the process will be handled online.

Schedule button will display a wizard, which has the facility to process the request either as a background job or schedule it for a specific time or for repeated execution on certain days of a week/month.

Create new task schedule

Schedule Name
Match Invoices with new PO Receipts

Task Name
Match Invoices with new PO Receipts

Schedule
Perform this task:

- Daily
- Weekly: 3 Hour
- Monthly
- Scheduled
- Interval: 0 Minute
- Custom

1 Invoice(s) matched.
IFS RE-PROCESSED THE INVOICE AGAINST RECEIPT
FULLY AUTHORIZED
AUTOMATICALLY AFTER MATCHING PROCESS
ENHANCED SUPPLIER INVOICE WORKFLOW
CONCEPT - PROCESS

- Requisition/Purchase Order
- Invoice/Goods Arrival
- Approval

- Invoice Import/Manual Entry
- PO Matching

- Posting/Authorization
- Payment
ENHANCED SUPPLIER INVOICE WORKFLOW

- Improves and automates supplier invoice workflow
- Reduces manual invoice registration - saves times & increases accuracy
- Effective follow up using automated messaging and history logging
Batch process most common
**POSTING PROPOSAL**

Authorized based on rules and workflow.

### 24 - Supplier Invoice Entry - SX 07/187/4484-C

**You Date:** 3/14/2011  
**Period:** 2011 3  
**User Group:** AC  
**You Type:** I  
**You No.:**

- **PO Ref.:** P100007
- **Receipt Ref.:**
- **Sub Contract Ref.:**
- **Supplier:** 0002  
**Name:** Iron Mountain
- **Gross Amount:** 266.00
- **Net Amount:** 266.00
- **Currency:** USD  
**Currency Rate:** 1.000000
- **Authorizer IDs:**
- **Tax Amount:** 0.00
- **Due Date:** 3/14/2011
- **Plan Pay Date:** 3/14/2011

### 24 - Posting Proposal

**PO Ref.:** SX 07/187/4484-C  
**Receipt Ref.:**
**Sub Contract Ref.:**
**Supplier:** 0002  
**Name:** Iron Mountain
- **Gross Amount:** 266.00
- **Net Amount:** 266.00
- **Currency:** USD  
**Currency Rate:** 1.000000
- **Authorizer IDs:**
- **Tax Amount:** 0.00
- **Due Date:** 3/14/2011
- **Plan Pay Date:** 3/14/2011

### Invoice Lines Information

<table>
<thead>
<tr>
<th>Line ID</th>
<th>Delivery Type ID</th>
<th>Income Type ID</th>
<th>Tax Code</th>
<th>Multiple Tax Lines</th>
<th>Gross Amount</th>
<th>Net Amount</th>
<th>Tax Amount</th>
<th>Tax Method</th>
<th>Gross Amount</th>
<th>Net Amount</th>
<th>Tax Amount</th>
<th>Withdrawn Tax Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>266.00</td>
<td>266.00</td>
<td>0.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Posting Information

**Proposal Status:** Auth  
**Status Detail Info:** Posting proposal is fully authorized and ready for final posting.

**Balance:** 0.00  
**Balance in Acc Curr:** 0.00  
**Status Message ID:** AUTH

**Code Part:**  
**Voucher Text:** Iron Mountain

- **Waiting**
- **Wrong Authorizer**
- **Automatic Tolerance Posting Enabled**
OPTION TO BRING IN XML DATA
LINE LEVEL MATCHING CAPABILITIES
## Supplier Invoice with Line Detail Matching

### Invoice Details

- **Supplier:** Boston Scientific
- **Invoice Number:** 22982
- **Bill To:** ST ELIZABETH HLTH CTR ATTN: ACCOUNTS PAYABLE 1044 BELMONT AVE YOUNGSTOWN OH 44501
- **Shipped To:** ST ELIZABETH HLTH CTR 3rd Floor Cash Dept 515 LEXINGTON AVE YOUNGSTOWN OH 44504
- **Purchase Order No:** 522144000001
- **Order Date:** 10/27/2014
- **Due Date:** 11/12/2014

### Item Details

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
<th>Quantity</th>
<th>Unit Price (U/A)</th>
<th>Line Amount (U/A)</th>
</tr>
</thead>
<tbody>
<tr>
<td>0001</td>
<td>WALLCRAFT PRO 7/8 X 7/80 10FT 70-595/Int/Vac/Burg</td>
<td>1</td>
<td>1774.50</td>
<td>1774.50</td>
</tr>
<tr>
<td>0002</td>
<td>WALLCRAFT PRO 7/8 X 7/80 10FT 70-595/Int/Vac/Burg</td>
<td>1</td>
<td>1774.50</td>
<td>1774.50</td>
</tr>
<tr>
<td>0003</td>
<td>WALLCRAFT PRO 7/8 X 7/80 10FT 70-595/Int/Vac/Burg</td>
<td>1</td>
<td>1774.50</td>
<td>1774.50</td>
</tr>
</tbody>
</table>

### Additional Information

- **Total Amount:** $5,428.00
- **Paid Amount:** $5,428.00

---

**Notes:**
- Advance Invoice
- Authorize for Payment at Final Posting
- Crediting
- Posting Process Tasks
- Received Attachments

---

**Code Notes:**

- [IFS Documentation](https://www.ifstech.com)
### 24 - Posting Proposal

<table>
<thead>
<tr>
<th>PO Ref:</th>
<th>Receipt Ref:</th>
<th>Sub Contract Ref:</th>
<th>Supplier:</th>
<th>Name:</th>
<th>Gross Amount:</th>
<th>Net Amount:</th>
<th>Currency:</th>
<th>Tax Amount:</th>
</tr>
</thead>
<tbody>
<tr>
<td>F100008</td>
<td></td>
<td></td>
<td>20003</td>
<td>BOSTON SCIENTIFIC</td>
<td>5423.00</td>
<td>5423.00</td>
<td>USD</td>
<td>0.00</td>
</tr>
</tbody>
</table>

Invoice Identity: 5X  100316-01  Invoice Status: Preliminary  Invoice Recipient: ERAN  Name: Eric Andersson

- [ ] Notes
- [ ] Proposal Authorized
- [ ] Received Attachments

#### Lines and Posting Info
- [Authorize]  [Cost Postings]

#### Authorize Summary

<table>
<thead>
<tr>
<th>+</th>
<th>Seq</th>
<th>Voucher Company</th>
<th>Authorizer</th>
<th>Name</th>
<th>Role</th>
<th>Status</th>
<th>Amount in Acc Curr</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>24</td>
<td>IPSAPP</td>
<td>Applications Owner</td>
<td>Authorizer</td>
<td>Unackno...</td>
<td>5428.00</td>
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</tbody>
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#### Authorize Details

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<tr>
<th>+</th>
<th>Row ID</th>
<th>Seq</th>
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<th>Authorizer</th>
<th>Name</th>
<th>Role</th>
<th>Status</th>
<th>Amount in Acc Curr</th>
<th>Date Created</th>
<th>Date Changed</th>
<th>User ID</th>
<th>User Name</th>
<th>Approval Rule Source</th>
<th>Approval Rule</th>
</tr>
</thead>
</table>
B2E – BUSINESS TO EMPLOYEE
OPTION TO APPROVE INVOICES OVER THE WEB
B2E – BUSINESS TO EMPLOYEE
NOTIFICATION IN APPLICATION, WEB OR E-MAIL
E-INVOICING

1. Definition

2. Different Types
   1. EDI
   2. XML
   2. Broker
   4. Email/PDF

3. Advantages of E-Invoicing
   - Saving Time & Money
   - Environmental Concerns
   - SOX Compliance
ADVANTAGES & DISADVANTAGES

1. EDI
   - Usually good for high volumes but difficult to implement and maintain.

2. XML
   - Again, usually good for high volumes but standards need to be met between supplier and buyer that can be complicated and can often change

3. Email/PDF
   - Simple, short set up time, user familiarity

4. Best Practices

5. Where does ReadSoft fit in?
INVOICES: INPUT TYPES

INVOICES

Administration

Manager

Scan

Interpret

Verify

Transfer

Production

Interpretation tuning

Optimize

INVOICES

image & data

image

XML

PDF

COLLECTOR

Email

image/PDF

incoming documents

Paper

Target system

image

PDF
WHAT IS COLLECTOR?

Objective
COLLECTOR FACTS

1. Is a plug-in for INVOICES
2. Ability to import and convert office documents (word and excel) into images*
3. Can communicate using MAPI or IMAP e-mail configurations
4. Able to set e-mail body as an appendix to the invoice image
5. Integrates directly into Interpret – Scan not needed
THANK YOU FOR ATTENDING!