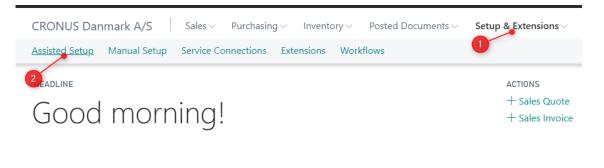
Invoice Scan 365

Setup

• 0

Before you start using Invoice Scan 365, you have to setup and activate the solution. This is done by going to the setup wizard in the Assisted Setup page.



Find Invoice Scan 365 within the list and click on the name "Set up Invoice Scan 365" or click the action "Start Setup"

CRONUS Danmark A/S Sales Purchasing	Inventory > Posted [Documents 🗸	Setup & Extension	, ∣ ≡	
Assisted Setup: All 🗸 🕴 🔎 Search 📲 Open in Exce	Actions \lor Fewer options				
	💒 Start Setup				
Name	Q General Videos	Help	Video	Group	Translated Name
Set up Cloud Migration		-	-	Get started with Dynamics	Set up Cloud Migration
Set up Invoice Scan 365	: •	-	-	Get started with Dynamics	Set up Invoice Scan 365

Click next on the first page, until you reach the registration page. Enter your information and click next.

INVOICE SCAN 365	2 ×								
(č)									
To begin the registration, please enter your information									
Full Name	John Doe 🥕								
Job Title	Employee 🔻								
Email · · · · · · · · · · · · · · · · · · ·	john.doe@email.com								
Phone No.	06666666666								
VAT Registration No.	DK77777777								
	Back Next Finish								

You have now been assigned an invoice email. This is the email you use, when you wan't to send a document for processing. The email can also be found at the Invoice Scan 365 Setup page afterwords. For now copy and save the email address.

INVOICE SCAN 365				I	2	\times
To use Invoice Scan 365, send an e address.	mail with	n an attachr	ment to the	following e	mail	
Invoice Email	94d9	c93cc3c37	07d@scan.ł	oilagscan.dk	:	
Right click the email link, to copy t	he email.					
Finalize the setup						
INVOICE SCAN 365			∠ ×			
\checkmark						
The trial has been activated, with 30 free import	:s.					
Output Type Journal Journal			•			
To continue using the product after the tranexp like Line Creation, please register the product.	it mes, or to n	icique auvance	eu reatures			
THAT'S IT!						
To save this setup, choose Finish.						
_						
	Back	Next	Finish			

On the last page, you can pick which output you expect from the imported invoices. All invoices are imported directly to the inbox and this option allow you to define whether the invoice should become a journal line or purchase document when fully imported.

Output Type: Journal

When this option has been selected, your invoice will be imported to a journal. Invoice Scan 365 create a new journal line and assign the picture to the journal line, ready for you to post it. The posted ledger entry will have the picture assigned.

If the invoice has multiple lines, all lines will be compiled into one journal entry.

Output Type: Document

When this option has been chosen, your invoices will become a fully qualified purchase document. The picture of the invoice will be attached to the document and the posted ledger entries.

Extended Setup

	+ ₪ ✓ SAVED ∏ ば
Invoice Scan 365 Setup	
🛛 Activate 🛛 🗙 Deactivate 🔹 Change Payment Method	A Mobile Users More options
General	Show m
Activated · · · · · · Yes	Invoice Email
Solution	
Output Type · · · · · · Document	Datavalidation
Create Lines	
Create Lines	

Some settings are assigned by default, from the Wizard. To further configure the product, you must go to the setup page, Invoice Scan 365 Setup.

On the Invoice Scan 365 Setup page, you can configure your solution to use a specific journal or create lines on your documents.

Output Type: Journal

When this option has been selected, your invoice will be imported to a journal. Invoice Scan 365 create a new journal line and assign the picture to the journal line, ready for you to post it. The posted ledger entry will have the picture assigned.

If the invoice has multiple lines, all lines will be compiled into one journal entry.

Output Type: Document

When this option has been chosen, your invoices will become a fully qualified purchase document. The picture of the invoice will be attached to the document and the posted ledger entries.

Create Lines

This feature is only available when you have selected output type Document, you can choose to have your solution create lines instead of just creating one line with the total.

Journal Setup

The journal setup is only used when your output type is journal. This allow you to specify in which journal the journal lines are created.

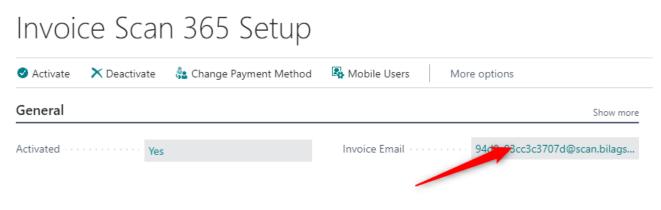
Data Validation

When data validation has been enabled, you are guaranteed that your invoices are always 100% correct. When this option is disabled you might experience that words or numbers has been misread.

Create an Invoice with Invoice Scan 365

This only apply if your solution is setup to have output type journal.

Send an invoice to the email address, that you were assigned during setup. The email can also be found at the Invoice Scan 365 Setup page.



Attach the invoice you would like to scan, to the email and send it.

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<u>S</u> end	<u>C</u> c					
	E <u>m</u> ne	Invoice				
Sales POF 99 K	s - Invoice.pdf B	~				

After about 2 minutes, you will find your invoice in the Invoice Scan 365 Inbox. When the invoice is ready for further processing, the status will become "Imported". The scanning procedure can take up to 30 minutes for basic solutions and up to 24 hours for Data Validated solutions (this is assigned in the Invoice Scan 365 Setup).

I	NVOICE SCAN	/0ICE SCAN 365 INBOX WORK DATE: 28-01-2021								
	✓ Search	+ New	Manage	Open in Excel	Actions	Fewer options		\ ≡		
	Document Type	e	Document No. ↓	Vendor Name		Invoice Date	Total Amount Excl. VAT	Status 🔻		
	Invoice	:	4413272	Schmeichel Møbler	A/S	18-01-2021	7.845,36	Imported		

Output Type: Journal

If you have selected journal as your output type, you will be required to assign a Posting Account to your invoice, before you can process it further.

Go to the Invoice Card, from the Invoice Scan 365 Inbox.

Actions				
General			Show more	PDF~
Vendor No. 3000	~ 00	Payment Date 01-02-2021		Invoice cronus
/endor Name Schr	meichel Møbler A/S	POSTING		Kere Kaller In Schreicher Machine Kall
AT Reg. No. DK6	9752846	Posting Account	\sim	ne Standparten DVC operinger Pendigat 1905 Autorp Sanut
tatus · · · · · Impo	orted	Payment Method Code BANK	\sim	000000000 Decommitizes Decision Access Toms 14 prior 2011 11 Notice 2011 114 days reter
nvoice Date 18-0)1-2021	Payment Reference		Low conversion of the second sec
Totals			Show more	
Total Amount Excl. VAT	7.845,36	Total Amount Incl. VAT	9.806,70	

You will notice, that the Posting Account is missing.

When you assign a posting account, you will be asked if you would like to store this as the default posting account, for this vendor. If you click Yes, the Posting Account will be preassigned the next time you get an invoice from this vendor.

This account, can be changed on the vendor card, at the Invoicing tab.

30000 · Schmeichel Møbler A/S

Process Request Approval Ne	w Document Navigate Vendor Mo	ore options	
Blocked	Ţ		
Address & Contact			Show more
ADDRESS		CONTACT	
Address	Ndr. Frihavsgade 45	Primary Contact Code	E000133
Address 2		Contact · · · · · · · · · · · · · · · · · · ·	Hr. Markus Nygaard
Country/Region Code	DK 🗸	Phone No.	
City	Copenhagen	Email · · · · · · · · · · · · · · · · · · ·	
Post Code	2100	Home Page	
Show on Map		Our Account No.	
Invoicing			Show more
VAT Registration No.	DK69752846 ····	Prices Including VAT	
Tax Liable		JCDBS INVOICESCAN	
Tax Area Code · · · · · · · · *	~	Default Invoicing Account	8210 ~

You can now generate the journal line, by going to Actions and clicking "Create Document"

DOCUMENT WORK DATE: 28-01-2021	 + 	圃
4413272 · Schmeichel Møbler A/	S	
Actions 2		
Refresh		
Vendor No	Payment Date	01-02-2021
Vendor Name · · · · · · · · · · Schmeichel Møbler A/S	POSTING	
VAT Reg. No DK69752846	Posting Account	8210 ~
Status Imported	Payment Method Code	BANK ~
Invoice Date	Payment Reference	
Totals		Show more
Total Amount Excl. VAT · · · · · · · · 7.845,36	Total Amount Incl. VAT	9.806,70

The journal lines created by Invoice Scan, will be marked with information field "Created By Invoice Scan 365"

GENERAL	JOURNA	LS WORK D)ATE: 28-01-20	21				√ SAVED	Д	
Batch Nam	e · · · ·			INVS	CAN					
Manage	Proces	ss Payroll	Page F	Post/Print Line	e Account	: Mo	ore options	7	7 0	
		Posting Date	Document Type	Document No.	Account Type	Accoun	Dimensions ~			
Scan 365	:	18-12-2019		SC0000001	Vendor	30000	Dimension Code ↑	Dimension Value Code	Dimer	nsion Value I
							INDKØBER	FF FF	Frede	erik Friis
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							Incoming Doc	ument Files \	/	
	A	ссо ВА	AL		BALA	TOTA	Name		Туре	2
AccName			ont		0,00	0,00	Schmeichel Mø	bler AS	: PDF	:

If there is no informations missing on the invoice during import, the journal line will be generated directly.

Output Type: Document with Lines

If you have selected Document with Document Lines as your output type, you will be required to assign an Account or item to your invoice lines, before you can process the document further.

Go to the Invoice Card, from the Invoice Scan 365 Inbox.

4413272 · Schmeichel Møbler A/S

Actions									
Gener	al								Show more
Vendor	No			30000		\sim	Payment Date	01-02-2021	Ē
Vendor	Name · · · · · ·			Schmeichel Møbler	r A/S		POSTING		
VAT Reg	j. No. · · · · · · · ·			DK69752846			Payment Method Code	BANK	\sim
Status				Imported			Payment Reference		
Invoice	Date · · · · · · ·			18-01-2021		Ē			
Lines	Manage								E
Li	ine Type		No.		Vendor Item No.	Description	1	Quantity	Line Amount
\rightarrow		÷	*		766BC-C	766BC-C (CONTOSO Reolsystem	1,00	8.088,00

You will notice, that there is lines on the Invoice Card.

When you assign an account or an item, the solution will remember you choise, next time your get this item from this specific vendor.

You can now generate the document, by going to Actions and clicking "Create Document"

DOCUMENT WORK DATE: 28-01-2021		 + 	Ŵ
4413272 · Schr	meichel Møbler A/	S	
Actions	2		
Refresh Treate Document	B Show Document		
Vendor No.	30000 ~	Payment Date	01-02-2021
Vendor Name	Schmeichel Møbler A/S	POSTING	
VAT Reg. No.	DK69752846	Posting Account	8210 ~
Status	Imported	Payment Method Code	BANK ~
Invoice Date	18-01-2021	Payment Reference	
Totals			Show more
Total Amount Excl. VAT	7.845,36	Total Amount Incl. VAT	9.806,70

The document created by Invoice Scan, will be marked with the information field "Created by Invoice Scan 365"