





How can we help you today?





Knowledge base

Getting started with Ocerra

Getting Started Fundamentals (7)

-  [Watch product tour video \(3-min\)](#)
-  [Getting Started Guide](#)
-  [Ocerra Glossary](#)
-  [How to access Ocerra](#)

Submitting invoices to Ocerra (7)

-  [Using email address to capture invoices](#)
-  [Using direct upload](#)
-  [File formats & limitations](#)
-  [Identifying invoice duplicates](#)

 [Inviting your team onboard](#)


[See all 7 articles](#)


Approval workflow setup (11)

 [Module overview](#)

 [Workflow States](#)

 [Approval setup intro & definitions](#)

 [Setting up roles for approval](#)

 [Understanding approval statuses](#)

[See all 11 articles](#)


 [Splitting a PDF file into separate documents](#)

[See all 7 articles](#)

General Settings (9)

 [General](#)

 [Invoice validation rules](#)

 [User notifications](#)

 [Import](#)

 [Custom fields](#)

[See all 9 articles](#)

Intelligent invoice data extraction

Invoice training & annotation (5)

 [Invoice annotation: Overview](#)

 [Value-based annotation](#)

 [Table-based annotation](#)

 [Single-line annotation](#)

 [What to do if data is not extracted correctly on the invoice?](#)

Invoice data extraction (19)

 [What data is extracted by Ocerra?](#)

 [Vendor/Supplier Settings](#)

 [How tax rates work on the invoice](#)

 [GL Codes/Tax Accounts](#)

 [Processing paid invoices](#)

[See all 19 articles](#)

Ocerra Integrations

Xero (5)

- 📖 Integration Overview
- 📖 Data flow diagram
- 📖 Integration setup details
- 📖 Exporting bills to Xero
- 📖 Xero FAQ

MYOB Account Right (4)

- 📖 MYOB AccountRight Integration
- 📖 Integration setup details
- 📖 Exporting bills to MYOB AccountRight
- 📖 Posting Credit Notes (MYOB AccountRight)

Analytics: Dashboard & Reports

Dashboards (3)

- 📖 Ocerra's default dashboard
- 📖 Building your custom dashboard
- 📖 Invoice list: adjusting & resetting

Release Notes

MYOB Advanced (6)

- 📖 Integration overview (MYOB Advanced)
- 📖 Integration setup details
- 📖 Exporting bills to MYOB Advanced
- 📖 Purchase Order matching
- 📖 Posting Credit Notes (MYOB Advanced)

[See all 6 articles](#)






File-based integration (4)

- 📖 Integration Overview
- 📖 File-based Import
- 📖 File-based Export
- 📖 Store Invoices from Ocerra using PowerShell

Analytics (2)



- 📖 AP Aging Report using Power BI
- 📖 Using Excel with Ocerra

Year 2020 (6)

-  July 2020
-  August 2020
-  September 2020
-  October 2020
-  November 2020

[See all 6 articles](#)

Year 2021 (2)

-  January 2021
-  February 2021