



Mekorma Invoice Capture User Manual

Build x92 — Last update: November 2, 2023

Mekorma

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1. Release Notes for Mekorma Invoice Capture Build 92

Mekorma Build x92 was released on Tuesday, October 24, 2023.

- Mekorma Build x92 is compatible with Microsoft Dynamics GP 18.4, 18.5, and 18.6.

✿ If you are a new user, please go directly to: [Introduction to Mekorma Invoice Capture](#).

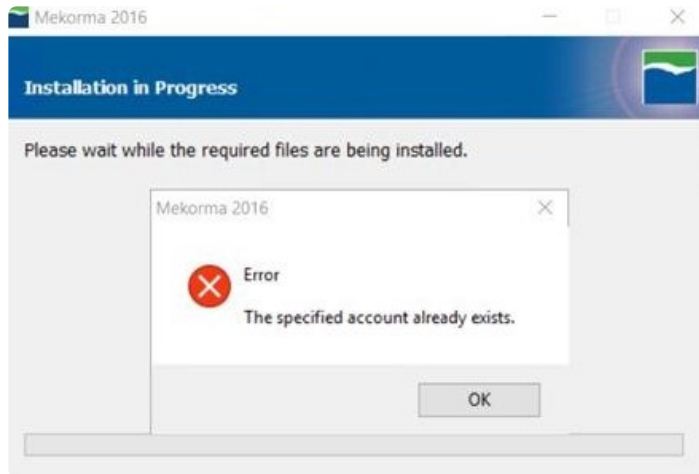
! If you upgrade from Mekorma build x90 or an earlier build, and you are using Invoice Capture, be sure that all invoices listed in the Invoice Capture Validation window are processed. To prevent processing invoices during upgrade, turn off the flow that monitors the inbox. For information on turning off a flow, please refer to <https://learn.microsoft.com/en-us/power-automate/disable-flow#turn-off-a-flow>.

Follow the links below for detailed notes on:

- [New Features & Changes](#)
- [Issues Fixed](#)

PLEASE NOTE

! If you upgrade from Mekorma build x80, and you receive the error message shown in the screenshot below, **please run the installer again**. If this error message persists, please contact the [Customer Success Team](#) and open a support case for assistance:



* You can always download the most recent version of Mekorma Payment Hub from our [website](#). Thank you!

* **IMPORTANT:** If you are running a Mekorma customization for a version prior to your current Microsoft Dynamics GP release, please [contact Mekorma's Customer Success Team](#) before upgrading to ensure compatibility with the new version.

Last modified: October 25, 2023

1.1. New Features & Changes

Release Notes for Mekorma Build x92 released Tuesday, October 24, 2023.

Announcements and Changes

- If you upgrade from Mekorma build x90 or an earlier build, and you are using Invoice Capture, be sure that all invoices listed in the Invoice Capture Validation window are processed. To prevent processing invoices during upgrade, turn off the flow that monitors the inbox. For information on turning off a flow, please refer to <https://learn.microsoft.com/en-us/power-automate/disable-flow#turn-off-a-flow>.
- Data migration after the upgrade:
 - When you are using MEM and upgrade Invoice Capture from x91 or earlier, the Invoice Capture Setup window will display the company email invoice and the entire list of entities. Users can enter an invoice email for each entity.
 - If the centralized process is used, the **Entity ID** field will be blank in the Action Board Process Maintenance window. You will need to add the entity ID to each process ID.
 - If the decentralized process is used, the proper entity for each invoice will be displayed in the **Entity ID** field in the Action Board Process Maintenance window.

New Features

- Mekorma Invoice Capture supports processing invoices by entity when you're using MEM. Users will be able to view only the entities to which they have access.

Last modified: October 25, 2023

1.2. Issues Fixed

Release Notes for Mekorma x92 released Tuesday, October 24, 2023.

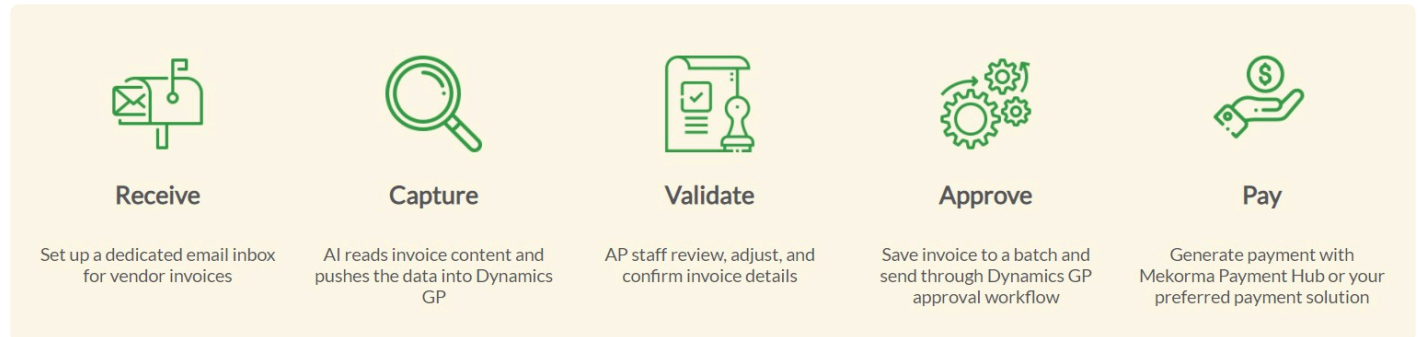
- The Email Extraction flow used for sending email notifications with Invoice Capture is compatible with Microsoft SQL Server version 2016 and later.

Last modified: October 23, 2023

2. Introduction to Mekorma Invoice Capture

Mekorma Invoice Capture allows you to reduce the tedious and manual effort of getting invoices into Dynamics GP without the complexity of a document management system! Supporting documents are interpreted with Microsoft AI Builder and attached to invoices automatically with DocAttach. This is a simple and streamlined system for automating invoice data entry, voucher creation, and approvals.

Using Microsoft Dynamics GP and Mekorma together, you now have a complete end-to-end AP automation solution:



Once your invoices are in the GP system, approved, and posted, they are ready to be paid. Invoice Capture is a stand-alone product, which means you can use it with or without Mekorma Payment Hub solutions.

From the moment you have a new vendor to the day payment is sent, Mekorma and Microsoft Dynamics GP make your AP process easier.

For assistance with this user guide, review to [How to Use This Guide](#).

Last modified: November 2, 2023

2.1. How Does Mekorma Invoice Capture Work?

Mekorma Invoice Capture integrates with Outlook email, Microsoft Power Platform with AI Builder, and Microsoft Dynamics GP. The system receives invoices through email and uses Power Platform and AI Builder to interpret them behind the scenes. We then give you an easy-to-use window in GP to validate the invoice data before converting it to an AP Voucher. The invoice and any supporting documents will be automatically attached to your vouchers through Dynamics GP DocAttach.

Watch this video for a quick overview of how Mekorma Invoice Capture works!



<https://www.youtube.com/embed/AqClbuAipgg?rel=0>



After the AP staff converts invoices to AP vouchers, they can be approved through the GP workflow, posted, and paid.

Last modified: October 25, 2023

2.2. Why Mekorma Invoice Capture?

- Mekorma Invoice Capture provides a simplified product for companies that don't need a full-fledged document management system.
- AP needs relief: too much paper!
- Approvers need to see original documentation before approving invoices or payments.
- Getting rid of paper makes it easier to work in remote locations.
- Manual entry is time-consuming, and mistakes are easy to make.
- When used with Mekorma Payment Hub, GP users can have an end-to-end automation solution.

Last modified: June 19, 2023

3. Preparing for Mekorma Invoice Capture

The Mekorma Invoice Capture Solution will be installed for you by the Mekorma Customer Success Team. We work hand in hand with you, your Dynamics partner, and IT team to ensure the most successful installation possible.

The Stakeholder Team

These are the people you will need on your team for a successful implementation:

- IT team: The IT team will provision the Microsoft licenses, create email accounts, manage security, and work with the Mekorma team on the install of Microsoft Power Platform and Mekorma Invoice Capture.
- External IT: Please include your Hosting IT partner or Microsoft partner if they maintain your systems.
- Controller or AP Manager: This person will advise on your company's invoice notifications, approval rules, and provide oversight.
- AP Specialist(s): These specialists will be guided in the daily use and best practices.

AP Specialist Work Station

The AP Specialists on your team will now be monitoring invoices on computer screens rather than on paper. For this, they will need monitors large enough to view the invoices legibly and have the data entry window to the side of the invoice view window so that they can see the invoice and see the data entry at the same time.

- For this purpose, we recommend a minimum monitor size of 25" and HD resolution (this is recommended but not required).

You will probably still get some invoices on paper and will need a scanner. The Fujitsu ScanSnap series works very well for low-cost, low-volume scanning.

Last modified: June 19, 2023

3.1. The Stakeholder Team

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Last modified: June 19, 2023

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You will probably still get some invoices on paper and will need a scanner. The Fujitsu ScanSnap series works very well for low-cost, low-volume scanning.

Last modified: June 19, 2023

3.3. IT Preparation

Your IT department needs to make some decisions before we can proceed:

- Determine your Microsoft licensing requirements for Microsoft Power Platform and AI Builder.
- Purchase required licenses.

✿ [For lower licensing costs, consider using an extended trial license.](#)

- Specify what email address you will use for receiving invoices.
- If your users want to be notified about incoming emails, specify who you will notify for each company.

The Mekorma Invoice Capture setup screen is available on the Mekorma Area Page under Setup>System>Invoice Capture Setup. It allows you to setup an email address used to monitor the system, the addresses your vendors should use to email invoices, and individuals to be notified when the system gets new invoices:

Company Name	Invoice Email Address	User To Notify
Fabrikam, Inc.	michaelv+TWD@mekorma.com	michaelv@mekorma.com
Balanced Business	michaelv+BB@mekorma.com	michaelv@mekorma.com
Complete Solutions	michaelv+CS@mekorma.com	michaelv@mekorma.com

Your Mekorma implementer will walk you through the considerations for setting up your Power Automate Environments and coordinating them with your email setups. These setups will depend a lot on whether you have one or many companies and whether you have independent AP departments or shared services environments.

The sections below give you an advanced view of these considerations.

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3.4. Power Automate Environments and Email Setup Requirements

Email setup and the number of Power Automate environments (and licenses) depend on the number of companies you manage and whether they share services and domain names.

1. If you administer 1 company, you need 1 license
2. If you administer multiple companies and you segregate invoice data out of security concerns, you will need a separate Power Automate environment for each one.
3. If you administer multiple companies with a centralized AP department, you may be able to share your Power Automate environment.
4. Even if you have a centralized AP department that shares data, if you want your companies to have distinct email addresses for your vendors to send their invoices, you will need different Power Automate environments.
5. If you are using the MEM Connector for Payables, you must have a separate invoice email per entity.

The Details

This chart shows these 4 cases in more detail and describes its setup:

	1. GP companies	Data access allowed between companies?	Separate email domain required for each company?	Number of Power Automate environments needed	Email(s) associated with Power Automate environment	Company Invoice Email
1	1	N/A	N/A	1	APInvoice@xxx.com	APInvoice@xxx.com
2	Multiple	N	Y	Multiple	APInvoice@xxx.com, APInvoice@yyy.com, APInvoice@zzz.com...	APInvoice@xxx.com for company A; APInvoice@yyy.com for company B; APInvoice@zzz.com for company C...
3	Multiple	Y	N	1	APInvoice@xxx.com	There are two options for setting up the email. One is using Microsoft plus addressing. The other is using Email aliases.

						Please see below for more details.
4	Multiple	N	Y	Multiple	APInvoice@xxx.com, APInvoice@yyy.com, APInvoice@zzz.com...	APInvoice@xxx.com for company A; APInvoice@yyy.com for company B; APInvoice@zzz.com for company C...

Configuring for Multiple Companies to Share one Power Automate Environment

There are two ways of configuring email so that individual companies can each have their own AP address but all the emails get forwarded through one Power Automate flow:

1. Microsoft Plus addressing
2. Email aliases

Microsoft Plus addressing (Case 3 recommended option)

With Microsoft [Plus Addressing in Exchange Online](#), using the following format will allow you to receive the invoice in a mailbox that the user desires:

Company invoice email address followed by a plus sign (+) and the company database name as shown in the example: APInvoice+TWO@xxx.com.

Email aliases (Case 3 alternative)

If Microsoft Plus addressing is not possible, the alternative is to create email aliases to make incoming invoices go to the right company. They all need to use the same domain:

- APInvoice1@xxx.com for company A
- APInvoice2@xxx.com for company B...

We recommend Microsoft Plus method because in some customer's systems, the alias email does not work properly when an email is sent from the same domain.

Why Are We Making This So Complicated?

Note that when you have multiple companies, the setup suggested in cases 2 and 4 is more straight-forward. So why do we support case 3?

The purpose that case 3 serves is to save you money by lowering the number of Power Automate environments you need to license. It has the disadvantage of having to use the same

domain name for email across all your companies and may lead to difficulty communicating with vendors who are servicing multiple companies.

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3.5. Sharing an Email Address Used for other Purposes

We recommend that you dedicate an email address for receiving AP invoices. However, if you have considerations that make you want to use the email address for other purposes, such as monitoring a more general AP queue, it can be done, with the caveat that senders will need to put a specific moniker in the subject line. The main use for this is in a testing scenario when you are first getting to know the product. It could also be used in very low volume situations.

In that case, you can designate a moniker, such as (INV) that goes at the beginning of each subject line. You can use Outlook with a rule to move any incoming email with that moniker to a sub-folder in your outlook. Any invoices moved to sub-folder will trigger the AI flow.

If you are using this on an ongoing basis, it is unlikely that vendors will put (INV) in their subject lines. The individual monitoring the email address will have to sift invoice emails and move them to that sub-folder.

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3.6. 'User to Notify' Email Address

You have the option to designate a user who will be notified whenever an invoice email is ready to verify in Dynamics GP. This can be a separate user for each Dynamics GP company or you can designate the same user for more than one of the companies. You can designate only one notification email address—if you need multiple people to be notified you will have to set up an email group in Active Directory.

The system will notify the user once an invoice email has been fully processed by the Power Automate flow and is ready to be verified in Dynamics GP.

Note that the *User to Notify* Email address cannot be the same as any *Company Invoice Email* or email associated with the Power Automate Environment.

If you do not wish to receive notifications for each invoice that is received, this field is not required.

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3.7. Controlling the Page Count in AI Builder

✿ [For lower licensing costs, consider using an extended trial license.](#)

Microsoft charges based on number of pages/month scanned by Power Automate AI Builder. The number of pages scanned might be of concern to you if you are processing over 500 invoices a month. These configuration options help save on your page count.

Company Name	Invoice Email Address	User
Fabrikam, Inc.	michaelv+TW0@mekorma.com	michaelv@mekorma.com
Balanced Business	michaelv+BB@mekorma.com	michaelv@mekorma.com
Complete Solutions	michaelv+CS@mekorma.com	michaelv@mekorma.com

To navigate here: Mekorma home page > Setup > System > Invoice Capture Setup

Maximum Scan-To Page

The Maximum Scan-To Page option limits the number of pages scanned in a single document.

- By default, this will be set up to 5 pages.
- If set to less than 1, it will error and re-set to 1.
- If set to greater than 10, it will error and re-set to 10.

Maximum Scan-To Page page is per document. It treats each document (email body or attachment) as a single invoice.

Email Body Action

Sometimes, a vendor may include pertinent invoice-related information in an email, along with the invoice attachment. With Build 90, Mekorma has updated Microsoft AI Builder's receiving and scanning process for emails. To give you more control over how your email bodies are

captured, there are three actions available: *Ignore*, *Store*, and *Store & Process*. Use the Email Body Action drop-down to determine how you want Invoice Capture to handle your email bodies.

- If you set Email Body Action to *Ignore*, Mekorma Invoice Capture will not scan the email body.
- If you set Email Body Action to *Store*, the system will store the email body only, but won't scan it unless there are no other attachments to process.
- To scan the email body for attachments and attach any PDFs to the invoice, set Email Body Action to *Store & Process*.

Add business rules to exclude scan files by file type

Mekorma Invoice Capture includes a feature to limit the number of pages scanned by Power Automate AI Builder to avoid exceeding more than 500 credits/2000 pages per month. This will help in reducing unnecessary scans. In the Mekorma Invoice Capture Setup window, you will find the Extensions button. By clicking it, you can select or deselect the extensions you would like to exclude. Extensions supported are:

- .JFIF
- .JPE
- .JPEG
- .JPG
- .PDF
- .PNG

By default, all the file types are marked. If none are marked, PDF will default.

Note: JPEG family includes: .JPEG, .JPG, .JPE

Last modified: June 19, 2023

3.8. Determining Your Microsoft Power Platform Infrastructure and License Requirements

- Only a single Microsoft Power Automate “per user” license is needed to run the Mekorma Invoice Capture flow in a single or multi-company Microsoft Dynamics GP scenario, regardless of the number of users you have.
- If you have multiple companies which run different Power Platform environments for each company, and you are going to deploy Invoice Capture in each environment, you must acquire a Power Automate “per user” license for each environment.
- Even if your company runs a single Power Platform environment to support multiple AP departments (i.e. shared services), we recommend deploying an Invoice Capture solution for each department so that each department uses its own domain name email address. Please contact our Professional Services team for further assistance. One Microsoft AI Builder license may be shared and assigned to each Power Platform environment.
- Note that you will not need a license for each user in your AP department, but rather an individual license for the entire department. We recommend assigning the license to an account associated to the email account for your AP department.

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3.9. Estimate Your Invoice Credits

Estimating the Number of Invoices You Process per Month

- The base Microsoft AI Builder license provides 1 million credits, which includes the ability to process up to 2000 pages per billing cycle.
- If you have more than one Power Platform environment for which you will be deploying Mekorma Invoice Capture, your AI Builder credits need to be split and assigned to each environment.
- If you need to process a greater volume you will need to purchase additional packs of pages per month.

Estimating the Number of Pages per Invoice

The Invoice Capture product will send the email body and any attachments through the AI engine with the assumption that each of those documents could be an invoice.

- For a single email, the lowest number of invoice pages would be 1. That would be for an email body that contains the invoice itself and is short.
- For the case where the email also has an attachment, the lowest number of invoice pages used will be 2.

By default, the system will cap the number of pages it processes in a single email body or attachment to 5. You can ask your Mekorma implementer to raise or lower that cap.

For more information about Microsoft Power Platform licensing costs, read [Licensing overview for Microsoft Power Platform – Power Platform | Microsoft Docs](#). The Mekorma Customer Success team is available to help you figure out exactly what you need for your scenario.

✿ [For lower licensing costs, consider using an extended trial license.](#)

Last modified: June 19, 2023

3.10. Try Before You Buy

As of Q3 2022, Microsoft offers extended trials of their Power Platform AI Builder component. At this time, customers can take advantage of this offer for a period of up to 2 years at Microsoft's discretion. After the trial period, customers must purchase AI Builder capacity at Microsoft published prices – \$500 per AI Builder unit per month, as of this writing.

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4. Using Mekorma Invoice Capture

After you've installed and set up up Invoice Capture, you are ready to use it.

First you need to [get your vendors to email invoices](#), and then you can use the Invoice Capture Validation window to complete the following tasks:

- [Review the invoice data](#)
- [Choose a vendor](#)
- [Handle the attachments](#)
- [Create a GP voucher](#)
- [Process multiple invoices](#)

Last modified: October 24, 2023

4.1. Getting Vendors to Email Invoices

Email direct to capture

The easiest flow is to direct your vendors to email their invoices to you to an email address that is monitored by Mekorma Invoice Capture. If you have multiple companies, vendors should use the email address for the company they are billing.

Email through AP

When first installing, you may want to monitor the invoices more closely while you get comfortable with the system. You can continue to use an email address that vendors are already sending to. IT can create a temp email for the capture system, and you can forward invoices to it when you get them.

When you feel confident, you can reconfigure the system to use your official email address simply by changing the email address on the setup screen.

Dealing with snail mail Invoices

Scan any paper invoices to a folder on your local drive. You can then email them to your Invoice Capture email address. You can attach multiple invoices to the same email if they all belong to one of your companies.

Downloading Invoices from a Portal

Vendors commonly have online portals for you to pull your invoices from.

Try to convince your vendors to include invoices as attachments. It is inconvenient for you to log into the vendor portal and download each invoice.

If you must, download the files to a folder on your local drive, attach to an email, and send it to your Invoice Capture email address. You can attach multiple invoices to the same email if they all belong to one of your companies.

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4.2. The Invoice Capture Validation Window

After the invoice data has been extracted by AI and submitted to GP, it will be pushed to the Mekorma Invoice Capture Validation window for further processing. This is a Mekorma work table with all the captured invoices listed. The invoice data can be sorted by individual column by clicking on the column header. You will validate the transaction data accuracy, adjust the entry as needed and instruct the system to create a GP Voucher Transaction.

To get to the Mekorma Invoice Capture Validation window go to: Mekorma area page > Transaction > Payables > Mekorma Invoice Capture Validation

Sender Name	Vendor ID	Document Number	Amount	Document Date	Due Date	Invoice Process Date
CREATIVE MEDIA	AUSTRALIA	24856	405.00	1/2/2020	5/25/2023	4/5/2023
<<No Vendor Name Found>>	INLINESE0001	006		5/11/2021		4/5/2023
HubSpot	SKYLABS0001	7320711	8,340.00	6/15/2021	7/15/2021	4/5/2023
amazon web services™	CONSUMER M...	02876HGA	689.08	7/6/2021	8/23/2023	4/5/2023
AMERICAN EXPRESS	ACETRAVE0001	21362	198,345.30	7/9/2021	4/5/2023	4/5/2023
Barclaycard	ACMERX035		27,854.27	12/5/2021	8/31/2023	4/5/2023

Attached Documents:

File Name
HubSpot-INVOICE-7320711.0.pdf

First, select the batch ID to use for your GP Voucher transactions. You can override it in the GP Transaction window if you need to put invoices in more than one batch. Then follow the Invoice Validation Checklist:

1. [Review the Invoice Data](#)
2. [Handle the Attachments](#)
3. [Create a GP Voucher](#)
4. [Delete Bogus Invoices](#)

In addition to the information about the process flow, we have 3 videos explaining more information about how the AI Engine process invoices:

1. [How AI processes multiple invoices in one email from one vendor.](#)

2. [How AI processes multiple invoices in one email from different vendors.](#)
3. [How AI processes an invoice in the email body.](#)

If you're using Multi-Entity Management (MEM) by Binary Stream®

If you're using MEM, the **Entity** field will be displayed. Users will only be able to view invoices for the entity to which they have access.

The screenshot shows the 'Mekorma Invoice Capture Validation - BB (sa)' window. It features a menu bar with 'OK', 'Actions', 'Redisplay', 'Options', 'File', 'Tools', 'Help', and 'Add Note'. Below the menu is a 'Batch ID' field and a 'Range' dropdown set to 'All'. The main area is divided into two sections: 'Transactions' and 'Attached Documents'.

Transactions Table:

Sender Name	Vendor ID	Document Number	Entity	Amount	Document Date	Due Date	Invoice Process Date
A Travel Company		125785	100	49,416.35	10/1/2023	11/1/2023	10/3/2023
Dolecki Catering		0025766	100	794.50	9/15/2023		10/3/2023

Attached Documents Table:

File Name
invoice for BB.pdf
Email_Body.pdf

If a batch is selected, any lines that do not have the entity of the batch will not be able to be marked.

The following table explains the options available from the View menu in the Mekorma Invoice Capture Validation window for both Transactions and Attached Documents. The options that are available depend on what is selected.

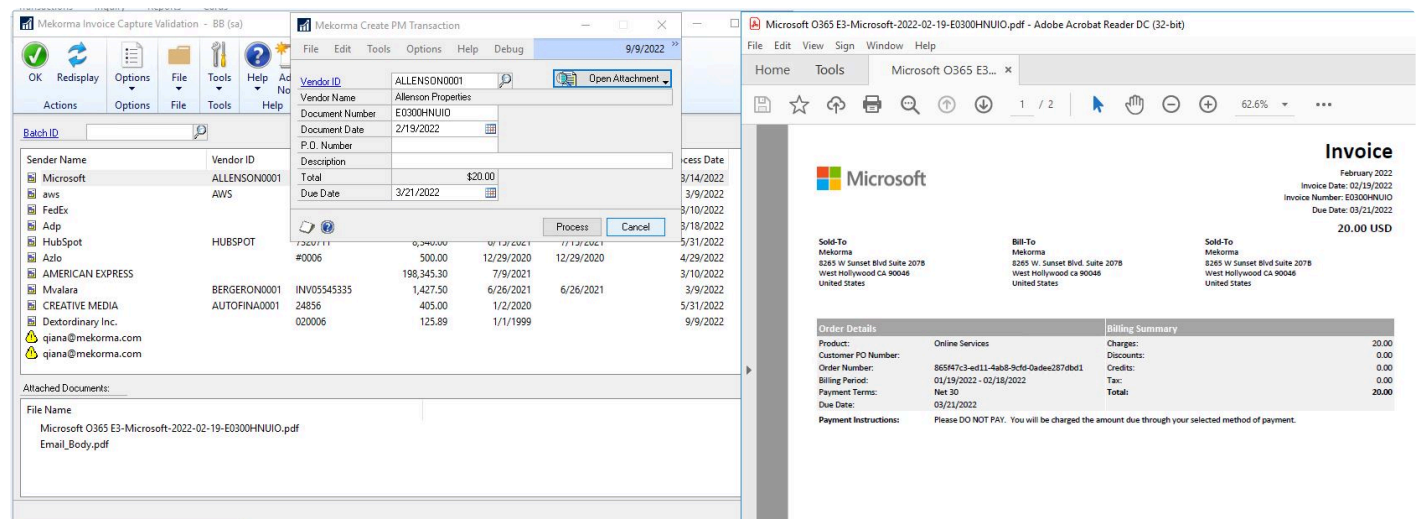
Menu Option	Description
-------------	-------------

Transactions	
Open Processing Window	Opens the Mekorma Create PM Transaction window where you can update or add information for the transaction.
Discard	Deletes the transaction from the window.
Update Entity ID	Opens the MEM Entity Lookup window where you can select a different entity for the transaction.
Update to Batch Entity: 000	Changes the Entity ID for the selected line to 000.
Attached Documents	
Open	Opens the selected attachment.
Discard Attachment	Deletes the selected attachment from the window.
Deselect this Attachment	Unselects the selected attachment.

Last modified: October 26, 2023

4.2.1. Review the Invoice Data

Double-click Sender Name on an invoice line to open the Mekorma Create PM Transaction window.



The invoice data captured by AI shows the Vendor Name, Vendor ID, Invoice Number, Document Date, Amount, and Due Date.

- Vendor Name: The AI interprets the vendor name and fills it in here. Under some conditions, this will show the sender email address instead (see [Why is sender sometimes an email address?](#)).
- Vendor ID: The AI will attempt to match the vendor name to a vendor in GP, but often cannot or guesses wrong. This is the most important field to scrutinize, and the system lets you easily look up the vendor to correct this field.
- Invoice Number/Document Date/PO Number/Amount: Extracted from invoice document. If the AI cannot interpret these fields, they will show blank, and you can fill them in.
- Due Date: The AI will extract a due date if present on the invoice and the system will use that due date on the PM Transaction. However, if the vendor has default payment terms stored in the vendor master in Dynamics GP, those payment terms will over-write any due date from the invoice. In that case, the due date field will show, but will be read-only. If you would like to use the due date from the invoice for a vendor with Payment Terms, you will need to override it in the PM Transaction Entry window.

Last modified: October 24, 2023

4.2.2. Why is Sender Sometimes an Email Address?

The system will only show a vendor name when the AI can identify something it perceives as a vendor name. Secondly, it needs to be able to identify something it perceives as an invoice number. When it cannot, it enters the sender email address instead of guessing the vendor name.

Sometimes this is because the email is not actually an invoice. See [Delete Bogus Sender Lines](#) for how to examine and handle these lines.

If the email is an invoice, you will be able to easily choose the correct vendor and you may only need to provide your own version of an invoice number to post this in Dynamics GP.

Last modified: June 19, 2023

4.2.3. Choosing a Vendor

If the AI finds a vendor name that it has seen before, it will default in the Vendor ID. Sometimes, there are vendors with similar names so you should always verify the vendor ID.

Every time you match a vendor name with a vendor ID, the system will store that for future use. This means that if you have two vendors with the same name, there will be two vendor IDs associated to that name. There are three possible scenarios:

1. Vendor name not found
 - a. You need to add a new vendor. Be sure to follow best practices. See [What if the Vendor is not in the System?](#)
2. Vendor name matched 1 vendor ID.
 - a. If you want to further verify that this is the correct vendor, click the lookup button next to the vendor ID and then show the lookup detail to verify the vendor's address.
3. Vendor name matched multiple vendor IDs.
 - a. The system will guess at one of your prior vendor IDs based on which has been used most often. An icon will appear next to the lookup button. If you click it, you will see a list of all of the vendor IDs that have been used with that vendor name, and you can pick a different one from the list.

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4.2.4. What if the Vendor is Not in the System?

What if you are processing an invoice and you find that there is no vendor? You should have a process for approving a new vendor into your system.

Best practices for new vendor setup include:

- Separation of Duties—Dynamics GP security should be set up so that the person entering or modifying the vendor maintenance file is not the same person that enters invoices or pays bills.
- Steps that are needed for setting up new vendors include:
 - TIN matching for IRS—you need to get a W9 and validate official vendor company tax info for 1099s.
 - Office of Foreign Assets Control (OFAC) screening.
 - Double verification for Remit-to address and banking information.
- Vendor Approval workflow—Microsoft Dynamics GP can be configured with a Vendor Approval workflow. When we discuss your needs, we will generally recommend that you include an approval workflow as part of your solution. A vendor approver will be a second set of eyes that ensures that the checklist steps are followed and approves the new vendor to the system.

The Mekorma Customer Success team is standing by to assist you with defining any of these policies and procedures to ensure a safe, auditable AP process.

Last modified: October 24, 2023

4.2.5. Handle the Attachments

You will want to review each of the attached documents to make sure that only one of them is an invoice and that all of them are related to the invoice you are reviewing.

✿ In addition to the information about the process flow, we have 3 videos explaining more information about how the AI Engine process invoices: [How AI processes multiple invoices in one email from one vendor](#), [How AI processes multiple invoices in one email from different vendors](#), [How AI processes an invoice in the email body](#)

When you double-click on any of the attached documents, the corresponding default file viewer will automatically open. For instance, if you're trying to open a .pdf file, it will open with the default .pdf viewer that you have set on your computer. You can then compare the data in the Mekorma Create PM Transaction window with the original document. The file types supported by Microsoft AI Builder are: .pdf, .bmp, .jpg, .jpeg, .gif, .png, .tif, .tiff, .txt, .doc, .docx, .xls, .xlsx.

Mekorma Invoice Capture uses “smart guesses” to figure out what to do with emails that have multiple attachments. There are several scenarios:

- An email with just a body, no attachments
 - The email body will be converted to a .pdf. The AI engine will try to process it as an invoice. When you review, if it is not an invoice, you will be able to discard it as a bogus invoice (see [Delete Bogus Invoices](#)).
- An email with one attachment
 - Normally this will be an email body with a courtesy note or additional information and an attached invoice.
 - The system will convert the email body to a .pdf file as supporting documentation.
 - The invoice line will show two attachments: the email body and the invoice.
 - If you review these and find either of them bogus, you can right click and discard it.
 - If you review them and find that they are two different invoices, you can right click one of them and choose “Create New Invoice”. It is unlikely in this case, but this ability exists for emails with multiple invoices attached to an invoice.
- An email with multiple attachments: the system guesses between a number of scenarios:
 - One attached invoice and supporting documentation
 - An assortment of attached invoices. This capability is useful if AP wants to forward a batch of invoices through the workflow. For more information, see Scanning Paper Invoices. See [Moving or Copying an Attachment from One Invoice to Another](#) for an example.
 - Multiple attached invoices with some supporting documentation.

Using the AI, the system gets a pretty good guess about each attachment to detect if it is an invoice or not. Its goal is to automatically separate invoices into separate lines so that when you use Mekorma Invoice Capture Validation window, you don't have to do that manually.

The system will process EACH of the attachments through the AI. It will find the invoice. Then, any documents that it doesn't recognize are attached as supporting documents.

But what if it finds multiple invoices? If all the documents are recognized as invoices, this is an easy case. The system will create a separate invoice line for each invoice. Each of them will also contain the body of the email as supporting documentation.

Another case is when none of the attachments are recognized as invoices. In that case, it is probably junk. The system groups them together for easy review. It creates one "invoice" line but instead of a vendor name it will show the sender email address. And that line will contain all the attachments for your review.

The most complex case is when there are multiple invoices and supporting documents. The system will create a separate invoice line for each invoice. It will group all unrecognized documents on a different line using the sender email address; the system will not try to match them to specific invoices. You will need to review these manually to move them to the correct invoices before processing those to GP Vouchers.

The next sections explain how to clean things up by deleting bogus sender lines or moving attachments between sender lines.

Delete Bogus Sender Lines

Mekorma Invoice Capture could receive an email that is not an invoice. In that case, you will see the sender's email address and you can review the attachments to ensure they are bogus.

To remove them:

1. Right click on Sender Name in the Mekorma Invoice Capture Validation window.
2. Choose Discard.

Mekorma Invoice Capture Validation - BB (sa)

OK Redisplay Options File Tools Help Add Note Debug

Actions Options File Tools Help Debug

Batch ID

Sender Name	Vendor ID	Document Number	Amount	Document Date	Due Date	Invoice Process Date
Microsoft	ALLENSON0001	E0300HNUIO	20.00	2/19/2022	3/21/2022	3/14/2022
aws	AWS	972333877	770.33	3/2/2022	1/1/2022	3/9/2022
FedEx		7-475-26286	27.90	8/20/2021	9/4/2021	3/10/2022
Adp			389.00	7/23/2021	7/30/2021	3/18/2022
HubSpot	HUBSPOT	7320711	8,340.00	6/15/2021	7/15/2021	5/31/2022
Azlo		#0006	500.00	12/29/2020	12/29/2020	4/29/2022
AMERICAN EXPRESS			198,345.30	7/9/2021		3/10/2022
Mvalara	BERGERON0001	INV05545335	1,427.50	6/26/2021	6/26/2021	3/9/2022
CREATIVE MEDIA	AUTOFINA0001	24856	405.00	1/2/2020		5/31/2022
Dextordinary Inc.		020006	125.89	1/1/1999		9/9/2022
qiana@mekorma.com						
qiana@mekorma.com						

Open Processing Window
Discard

Attached Documents:

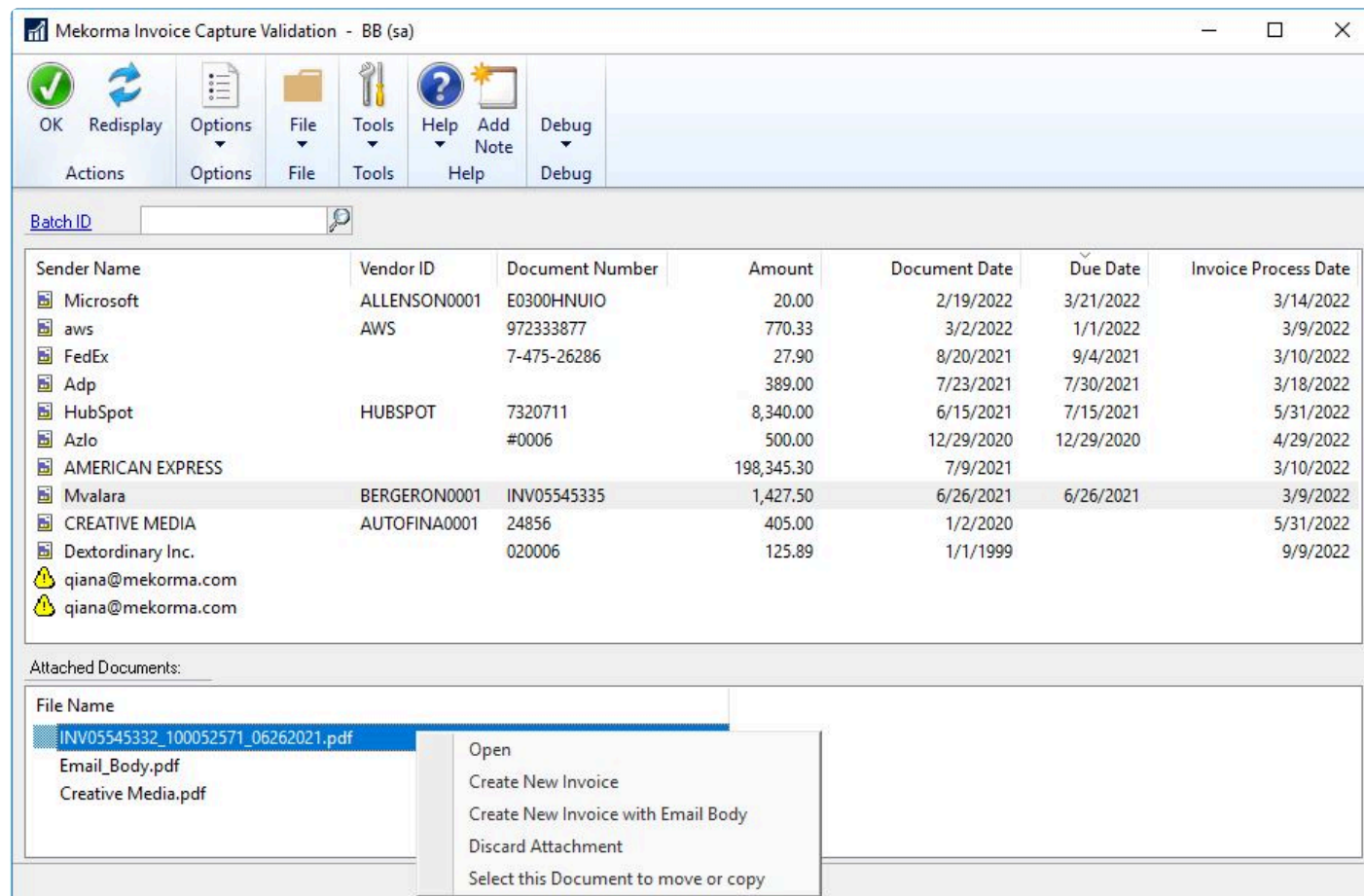
File Name

2021-06 Amex.pdf
image002.png
image003.png
Email_Body.pdf

Moving or Copying an Attachment from One Invoice to Another

When you are reviewing attachments, there are two cases when you might want to move an attachment to another invoice line:

1. An attachment is a supporting document for an invoice on another line.
2. An attachment is an independent invoice.



To move or copy a supporting document to another line:

1. Right click on the supporting document in the Attached Documents window and choose "Select this document to move or copy".
2. Right click on a different invoice line in the Sender Name window.
3. Choose "Move File Email_Body.pdf Here" or "Copy File Email_Body.pdf Here". These options will show on the Invoice line context menu when you choose to move or copy an attachment.

To move a supporting document to its own independent invoice line:

1. Right click on the supporting document in the Attached Documents window and choose "Create New Invoice".
2. The system will create a new line under the Sender Name window with that attachment so that you can process it as an independent invoice.

Attaching the Same Attachment to Multiple Invoices

You may get one invoice document that you want to create in GP as multiple vouchers. For example, the invoice may have sections that need to be approved by different approvers.

In this case, when you are reviewing the attachment the first time, you can download it. Then

email it back to the system for each split that you need to create. You will then adjust the total on each voucher you create for just the part of the invoice you want to pay. You will also want to adjust the document number to make it unique for each voucher.

Delete Bogus Attachments

You may not need all the attachments on an invoice.

To remove them:

1. Right click on the supporting document in the Attached Documents window.
2. Choose Discard Attachment.

Last modified: June 19, 2023

4.2.6. Create a GP Voucher

Once you have finished organizing your attachments onto the correct invoices and reviewing the data in the **Mekorma Create PM Transaction** window, click “Process” on that window. This will open *PM Transaction Entry* in Dynamics GP. You can then verify your GL distributions, payment terms, remit-to address, and other information, before saving to your batch.

Note that due dates and terms discount dates will be calculated with the vendor’s default payment terms when you process the invoice line to Dynamics GP. Even if the invoice has a specific due date, the vendor’s default payment terms will take precedence when the voucher is created in Dynamics GP.

If you’re using Multi-Entity Management (MEM) by Binary Stream®

When you’re using MEM, the Entity field will be displayed in the Invoice Capture Validation window. Users will only be able to view invoices for the entity to which they have access.

Vendor ID		Open Attachment	
Vendor Name	A Travel Company		
Document Number	125785	Entity	100
Document Date	10/1/2023		
P.O. Number			
Description			
Total	\$49,416.35		
Due Date	11/1/2023		

If a batch is selected, any lines that do not have the entity of the batch will not be able to be marked.

Last modified: October 26, 2023

4.2.7. Window Positioning Hints

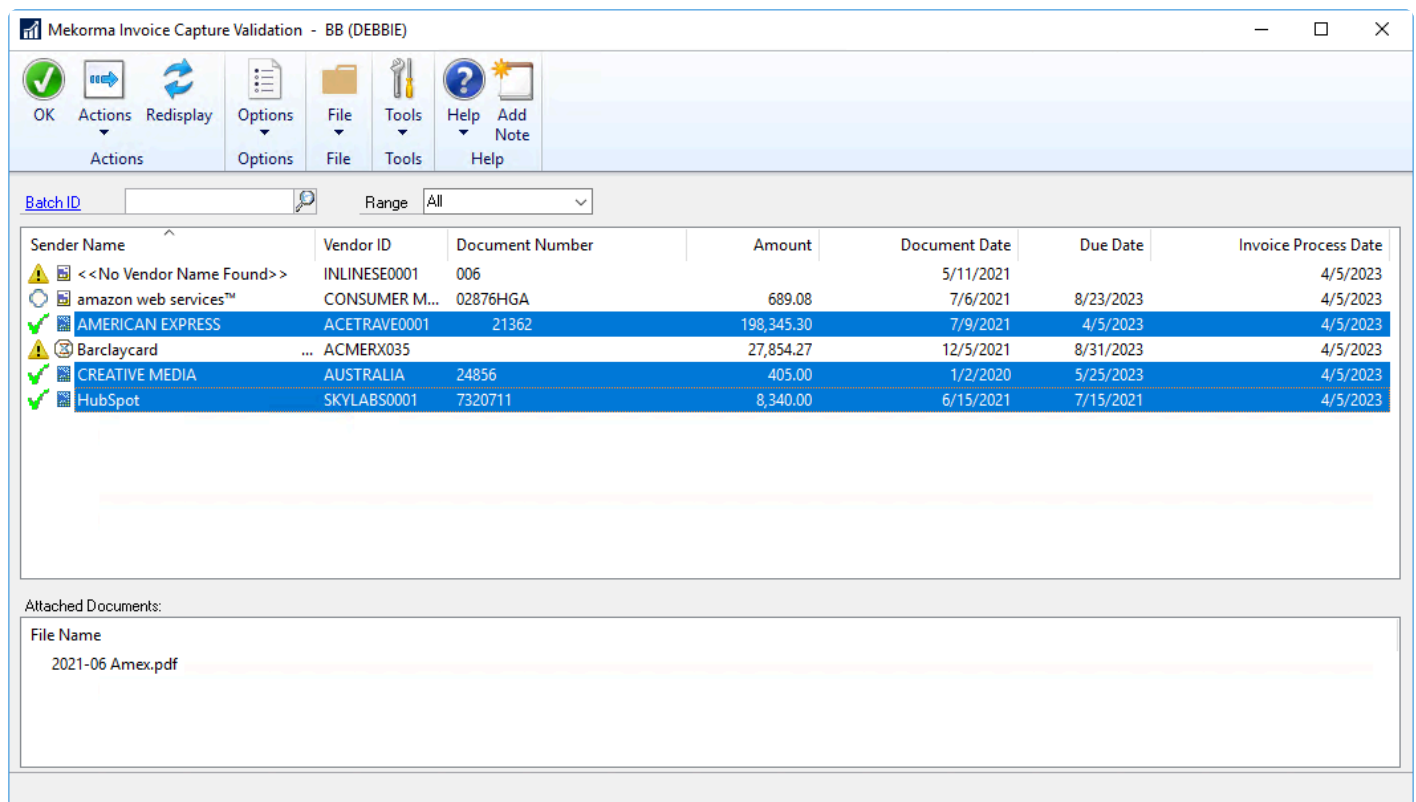
When you double click an invoice and attachment, both the attachment window and the Create PM Transaction window will open. The Create PM Transaction window will always open in the upper left area of the screen relative to Dynamics GP. We recommend that you reposition the attachment window to the right side of your screen. The system will remember where you put the attachment window. Since there are several file types supported (e.g. .pdf, .jpg, .tif, etc.), several different viewing applications are used. You will need to position the attachment window for each of these and the system will remember where they were.

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4.2.8. Process Multiple Invoices

Mekorma Invoice Capture has the capability to process multiple invoices simultaneously. To select the desired invoices, click to the left of Sender Name or hold down the Ctrl or Shift key while clicking the specific invoices. Right-click to open the context menu and perform the necessary action. A *green checkmark* indicates that the invoice has all the necessary information and can be processed in the batch. Conversely, a *yellow alert* icon signifies that the invoice cannot be processed in a batch.

 Invoices with an alert can still be processed individually.



Mekorma Invoice Capture Validation - BB (DEBBIE)

OK Actions Redisplay Options File Tools Help Add Note

Batch ID: Range: All

Sender Name	Vendor ID	Document Number	Amount	Document Date	Due Date	Invoice Process Date
<<No Vendor Name Found>>	INLINESE0001	006		5/11/2021		4/5/2023
amazon web services™	CONSUMER M...	02876HGA	689.08	7/6/2021	8/23/2023	4/5/2023
AMERICAN EXPRESS	ACETRAVE0001	21362	198,345.30	7/9/2021	4/5/2023	4/5/2023
Barclaycard	ACMERX035		27,854.27	12/5/2021	8/31/2023	4/5/2023
CREATIVE MEDIA	AUSTRALIA	24856	405.00	1/2/2020	5/25/2023	4/5/2023
HubSpot	SKYLABS0001	7320711	8,340.00	6/15/2021	7/15/2021	4/5/2023

Attached Documents:

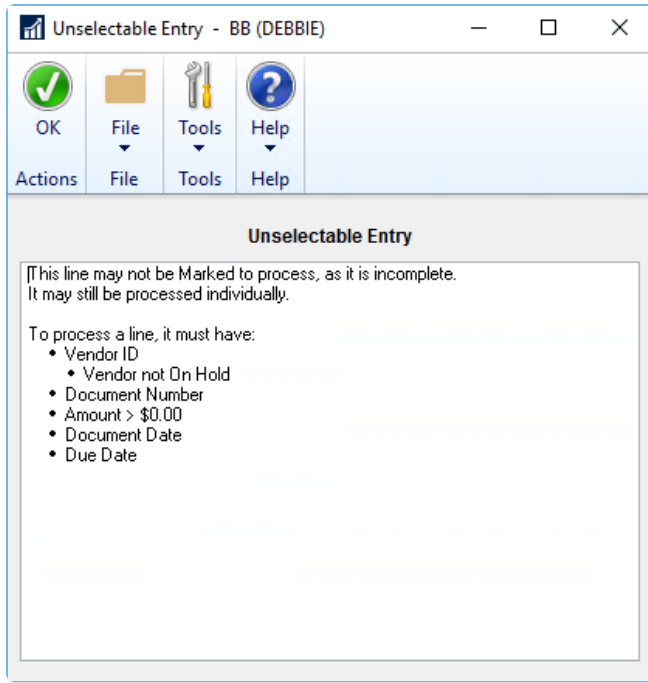
File Name

2021-06 Amex.pdf

Once you have selected and marked the desired invoices, enter a Batch ID to create a Payables Batch Entry. After saving the batch entry, process the batch by clicking Actions > Process. Once the process is complete, you will receive a report, *Payables Transaction Edit List*.

If an invoice is marked with a yellow alert icon, click the icon to review any issues. This may be due to the following:

- Vendor ID is set with non-functional currency
- Vendor ID, Document Number, Amount, Document Date, or Due Date is empty or incomplete
- Vendor status is on hold



If you're using Multi-Entity Management (MEM) by Binary Stream®

When you're using MEM, the Entity field will be displayed in the Invoice Capture Validation window. Users will only be able to view invoices for the entity to which they have access. If a batch is selected, all lines that do not have the entity of the batch will not be able to be marked.

An invoice without an entity ID, but all other information (Vendor ID, Document Number, Amount, Document Date, and Due date) cannot be marked for multi-processing.

Mekorma Invoice Capture Validation - BB (sa)

OK Actions Redisplay Options File Tools Help Add Note

Actions Options File Tools Help

Batch ID Range All

Transactions

Sender Name	Vendor ID	Document Number	Entity	Amount	Document Date	Due Date	Invoice Process Date
A Travel Company		125785	100	49,416.35	10/1/2023	11/1/2023	10/3/2023
Dolecki Catering		0025766	100	794.50	9/15/2023		10/3/2023

Attached Documents

File Name

invoice for BB.pdf

Email_Body.pdf

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4.2.9. Filter Invoices

Filters are useful when you need to narrow down results more effectively. Using the **Range** drop-down, you can filter invoices alphabetically with Vendor ID or numerically with Document Amount.

The screenshot shows the 'Mekorma Invoice Capture Validation - BB (DEBBIE)' window. The 'Range' dropdown menu is open, showing options: 'All', 'By Vendor ID', and 'By Document Amount'. The 'By Document Amount' option is selected. The 'From' field is set to '\$2,000.00' and the 'To' field is set to '\$50,000.00'. The table below shows two invoices:

Sender Name	Vendor ID	Amount	Document Date	Due Date	Invoice Process Date
HubSpot	SKYLABS0001	8,340.00	6/15/2021	7/15/2021	4/5/2023
Barclaycard	ACMERX035	27,854.27	12/5/2021	8/31/2023	4/5/2023

Below the table, the 'Attached Documents' section shows a file named 'HubSpot-INVOICE-7320711.0.pdf'.

Last modified: June 19, 2023

4.3. TIPS AND TRICKS

Last modified: June 19, 2023

4.3.1. Dealing with Snail Mail Invoices

If you still receive invoices by postal mail, you can scan all the invoices to a folder. Then email all of the invoices in a single email to your AP email address. The AI will be able to see that they are all independent invoices and automatically split them into different invoice lines.

Last modified: June 19, 2023

4.3.2. Modifying Email Addresses

You may want to change who gets notified about new invoices captured in the system. You can make changes in the Mekorma Invoice Capture Setup window.

Company Name	Entity ID	Invoice Email Address	User To Notify
Fabrikam, Inc.		fabrikam_invoice@mycompany.com	sally@mycompany.com
Balanced Business		bb_invoice@mycompany.com	debbie@mycompany.com
Complete Solutions		cs_invoice@mycompany.com	ken@mycompany.com

Note that you should only change the **User To Notify** column. If you want to use a different email address for your vendors, you will need to coordinate that with your Power Platform environment. In that case, contact the Mekorma Customer Success team for assistance.

When you are using Multi-Entity Management (MEM) by Binary Stream®, there will be multiple entity lines for each GP company that uses MEM. You must enter a different invoice email per entity. When MEM is either not installed, or installed but disabled, the **Entity ID** column will be displayed, but the column will be empty. One row will be displayed for each GP company.

Mekorma Invoice Capture Setup - BB (sa)

Save Redisplay Cancel File Tools Help Debug

System User Email sa@gpcompanies.com Maximum Scan-To Page 5
OneDrive Base Path Invoice Capture Email Body Action Store & Process

Company Name	Entity ID	Invoice Email Address	User To Notify
Fabrikam, Inc.		invoices+TWD@fabrikam.com	sa@gpcompanies.com
Balanced Business	000	invoices+BB@balancedbusiness.com	sa@gpcompanies.com
Balanced Business	100	invoices+BB100@balancedbusiness.com	sa@gpcompanies.com
Balanced Business	200	invoices+BB200@balancedbusiness.com	sa@gpcompanies.com
Balanced Business	300	invoices+BB300@balancedbusiness.com	sa@gpcompanies.com
Balanced Business	400	invoices+BB400@balancedbusiness.com	sa@gpcompanies.com
Balanced Business	500	invoices+BB500@balancedbusiness.com	sa@gpcompanies.com
Balanced Business	600	invoices+BB600@balancedbusiness.com	sa@gpcompanies.com
Balanced Business	999	invoices+BB999@balancedbusiness.com	sa@gpcompanies.com
Complete Solutions		invoices+CS@Completesolutions.com	sa@gpcompanies.com

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4.3.3. How AI Processes Multiple Invoices in One Email, from One Vendor

Mekorma Invoice Capture uses artificial intelligence (AI) to read, capture, and enter invoice data into Microsoft Dynamics GP. This video shows how Invoice Capture processes multiple invoices in one email, from one vendor.



<https://www.youtube.com/embed/ebe-KBK134U?rel=0>

Last modified: June 19, 2023

4.3.4. How AI Processes Multiple Invoices in One Email, from Different Vendors

Mekorma Invoice Capture uses artificial intelligence (AI) to read, capture, and enter invoice data into Microsoft Dynamics GP. This video shows how Invoice Capture processes multiple invoices in one email, from different vendors.



<https://www.youtube.com/embed/wFe0JPR3Ffo?rel=0>

Last modified: June 19, 2023

4.3.5. How AI Processes Invoices in the Email Body

Mekorma Invoice Capture uses artificial intelligence (AI) to read, capture, and enter invoice data into Microsoft Dynamics GP. This video shows how Invoice Capture handles invoices that arrive to you as part of the body of an email.



<https://www.youtube.com/embed/zBjMrescTBQ?rel=0>

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5. Next Steps: Approving, Posting, and Paying

The next steps in your process are to:

1. Route your invoices through the Microsoft Dynamics GP Workflow for Approval
When we discuss your needs, we generally recommend that you include an approval workflow as part of your solution. The Mekorma Customer Success team is standing by to assist you with defining your approval rules and setting them up.
2. Post invoices
Once the invoices are approved, the batch will be ready for posting
3. Pay
Refer to [Requesting Support, Implementation or Customization](#) for more information on Mekorma Payment Hub.

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6. IT Responsibilities and Troubleshooting

Mekorma Invoice Capture is based on Microsoft Power Platform. Microsoft Power Platform provides tools for monitoring its activities to detect kinks in the system.

The IT department may monitor the [AP Mailbox Power Automate workflow](#) for errors.

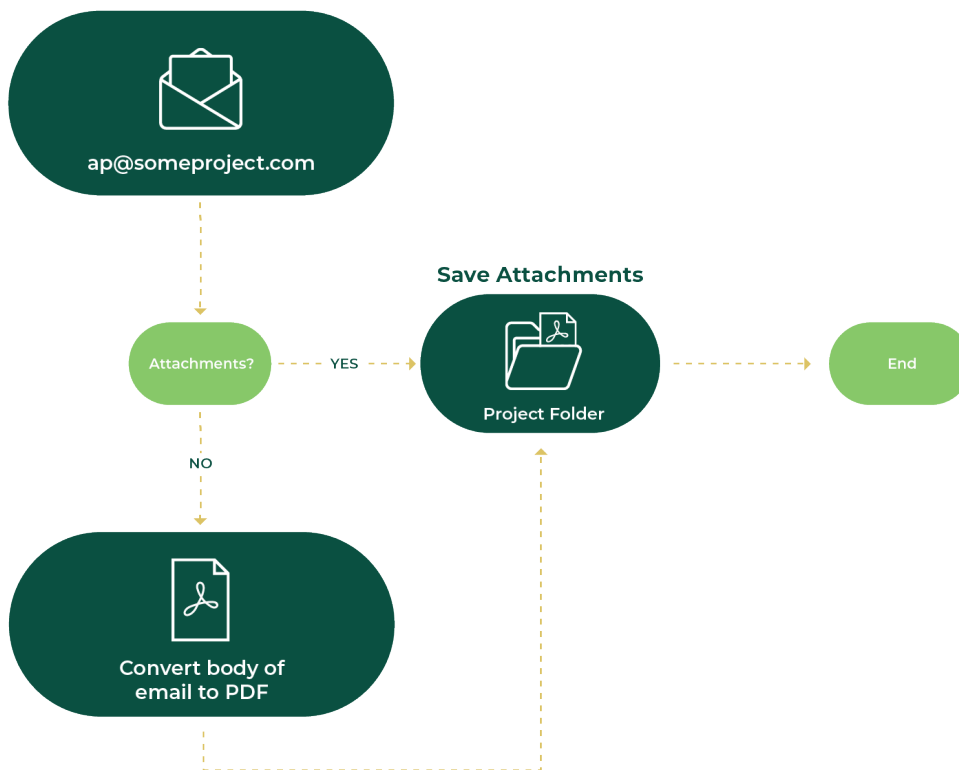
Last modified: October 24, 2023

6.1. AP Mailbox Monitoring Workflow

The AP Mailbox Monitoring workflow receives emails via the AP departmental mailbox and saves the email bodies and their attachments to a project file folder. Vendor invoices can be submitted in PDF, in image formats (JPEG, JPG, TIFF, BMP, etc.), or embedded in the body of the email.

The AP Mailbox Monitoring workflow convert the email body to a PDF document and saved in a project file folder on OneDrive. Sometimes the email is the invoice itself but most often it serves as supporting documentation.

WHEN AN EMAIL IS RECEIVED



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7. Upgrading Mekorma Invoice Capture

Before You Start

The upgrade process assumes that you have an existing Invoice Capture installation and that you are upgrading to a newer version. If you are doing a new installation, do not proceed with these instructions. Please contact our [Customer Success Team](#) for assistance.

Mekorma Invoice Capture composes of two parts that both must be installed and setup.

1. [Dynamics GP Component](#)
2. [Power Platform Solution](#)

The following instructions will walk you through the process to install and setup both.

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7.1. Dynamics GP Component

Installing Mekorma Invoice Capture

1. Acquire the Mekorma Invoice Capture installer from your Mekorma contact person.

_# Be sure that there are no users logged in to Dynamics GP.

2. Locate the installation file and run it in administrator mode and click yes to continue.
3. Be sure to install the correct build. (E.g., Below, we are installing Invoice Capture build x88).
4. Click **Next**.
5. Accept the License agreement and click **Next**.
6. Review the installation path. If you have multiple instances of Microsoft Dynamics GP installed, be sure the correct path is displayed.
7. Click **Next** to continue.
8. Once the installation is complete, click **Finish**.

Completing the Table Maintenance Process

1. Run Dynamics GP and log in as 'sa'.
2. Click **Yes**.
3. When the Mekorma Product Table Maintenance window opens, mark the companies to upgrade. You can select all companies, or only the companies which use Mekorma Invoice Capture.
4. Click **Process & Enable Selected Companies** to create/update tables.
5. When the table maintenance process is complete, restart Dynamics GP.

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7.2. Power Platform Solution

The Mekorma Invoice Capture upgrade will be using the following components that you've already setup from the previous installation. You do not need to recreate them.

1. SQL Server Connector
2. Office 365 Outlook Connector
3. OneDrive for Business Connector
4. Microsoft Dataverse Connector

Follow instructions below to finish the upgrade.

1. Acquire the Invoice Capture solution from your Mekorma contact person. This is a zip file that you must not unzip. It is typically named like the following:
 - MekormaInvoiceCapture_1_0088.2209_1248.zip
2. Log into <https://make.powerapps.com> with the service account user credentials.
3. Make sure that you are in the right environment. The name is on the purple bar at the top middle-right.
4. Confirm that all 4 flows are still available as shown below.
5. Click on Solutions and then click Import.
6. Browse and select the Invoice Capture solution zip file.
7. Click Next. You will see the screen below where it tells you that you are importing an upgraded version of the solution.
8. Click Import to proceed.
9. The import process will start. Do not do anything until the process is done. You will see a progress indicator at the top.
10. Once the import is done, the status will show green.
11. Review the Created and Version column to confirm that the latest build has been installed.
12. At this point, Invoice Capture has been upgraded; however, we'll need to confirm that the Flow is still running.
13. Click the back arrow (°) on the top left to go back to the previous window.
14. Go to the Flow section and then click the ellipsis (...) for 'Email Extraction'. If the Flow is off, select 'Turn On'. Wait a few seconds for it to finish. If the flow is already on, there is nothing to do.
15. Click the pencil icon to edit the flow.
16. Click the topmost blue bar to expand downward.
17. Confirm that the email address is correct. If it is reset, enter the invoice capture email address for your company.
18. Click Save and wait a few seconds for it to finish.
19. At this point, you can proceed to the next section to confirm the Invoice Capture setup in Dynamics GP.

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7.3. Invoice Capture Setup

Even though this is an upgrade only, it is still good practice to validate your existing setup. Go through the following sections to confirm that all setup information is still correct.

Invoice Capture Setup Window

1. Start Dynamics GP.
2. Open the Invoice Capture Setup window. (Mekorma Area Page >> System >> Invoice Capture Setup)

Company Name	Invoice Email Address	User To Notify
Fabrikam, Inc.	invoices@fabrikam.com	karen@fabrikam.com
Balanced Business	invoices@balancedbiz.com	ryan@balancedbiz.com
Complete Solutions	invoices@completesolutions.com	debbie@completesolutions.com

3. Verify the following information.
 - **System User Email:** If the process cannot be complete, the system will send an email to this user. This is an optional field and you can leave it blank.
 - **OneDrive Base Path:** Invoice capture will use this OneDrive folder for the Invoice Capture service account user to organize emails/invoices that are received. Subfolders will be created automatically for each company within this folder.
 - **Invoice Email Address:** This is the alias email address assigned to this company. For example, all emails going to live_invoice@mycompany.com will be captured and sent for review in the Live company. Each company must have a unique email alias.
 - **User to Notify:** This is the email of the person that should be notified when an invoice has been captured and ready to be reviewed. You may have the same or different person for each company.
4. Click Save.

Invoice Capture Window

1. Open the Mekorma Invoice Capture Validation window. (Mekorma Area Page >>

Transactions >> Payables >> Mekorma Invoice Capture Validation)

2. Confirm that data is being populated in this window.

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8. Requesting Support, Implementation or Customization

We are here to help!

If you are having a specific issue with your Mekorma products and require assistance from our Customer Success team, please log in to our [online portal](#) and open a new case.

- [Technical Support](#) is included with your yearly enhancement plan (for users on a supported version of Dynamics GP). [Open a support case](#).
- [Implementation Support](#) is available to help you prepare, install, or configure any aspect of Mekorma Invoice Capture.
- [Customization Support](#) is available if you want to go beyond the built-in feature set of our product.
- [Automation Support](#) is available through our Power Platform support team.

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9. How to Use This Guide

New users can follow step-by-step installation, configuration, and usage instructions delivered via written content and video demonstrations. Experienced users can review this guide for any applicable [new feature information](#), or use it as an ongoing reference tool:

- Pull targeted results using the **Search** functionality in the top menu bar.
- Use the **expandable menu** on the left sidebar to discover topics of interest.
- Bookmark pages or share links with colleagues, as each page in the guide has its own unique URL.
- Print individual pages by clicking on the **printer icon** at the top right corner of any page.
- Download/Print the entire user guide by clicking on the **Download as PDF** button at the very bottom of the left-hand menu.
- **Contact us with your ideas** if there are any new features or enhancements you would like to see in a product, by using the link at the bottom of each page.

If you are looking for a more tailored experience, our dedicated Customer Success team is ready to support you, guide you through product implementations, and assist you with any customized build requests. For more information, see [Requesting Support, Implementation, or Customization](#), or visit us at our [website](#).

Last modified: November 2, 2023