

## **TOTAL INVOICE MANAGER**

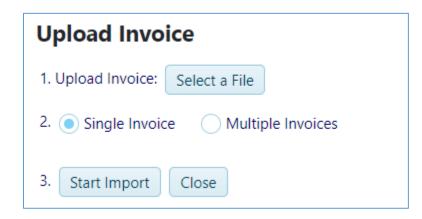
The **Total Invoice Manager** (sometimes shortened to **TIM**) is a powerful *Optical Character Recognition* (*OCR*) tool that will allow you to upload invoices and have data automatically read and populated to make submitting offline invoices through Procurement Partners a breeze.

**NOTE**: The Total Invoice Manager tool is a premium service that may not be available for all organizations. If you want to know more, please have your corporate team reach out to your organization's Account Manager.

Using sophisticated technology, it is possible to upload invoices and have the fields within automatically scanned and read without the need for a template. While this process is still under construction, it will provide you a method of entering invoices efficiently and easily.

To begin, log into Procurement Partners and click on the Total Invoice Manager tab. You will see a list of

previously created invoices. To start a new invoice upload, click the Create Invoice button. The Upload Invoice form will appear:



1. Click the Select a File button and choose the PDF you wish to upload. When the file is selected, the invoice preview will be displayed to the right of the button.



- 2. Select **Single Invoice** if your uploaded file is a singular invoice. Select **Multiple Invoices** if your file contains more than one invoice.
  - a. If you select Multiple Invoices, enter the total number of invoices within the PDF, then click the "Pages per Invoice" button.
  - b. Enter the number of pages of each invoice.
- 3. Click the Start Import button. The PDF will be uploaded to the server.

You will receive a message that reads: Your invoice has been uploaded for processing. This may take a few minutes. Keep refreshing the grid until you see that your invoice is Ready for Review. Then click on it to review/edit details.

Click the Refresh button O periodically to verify the progress. Your invoice should appear shortly:

Created By	Invoice Date	Location	Invoice No.	Vendor	Total Amount	Last Modified	Status
Support22	6/16/2021	SELECT LOCATION	TIM20210616152607121	Select Vendor	\$0.00	06/16/2021 14:26	Ready for Processing
Support22	10/1/2020	Locust Grove	1412000050151	Kevin's Carpentry	\$1,896.85	06/16/2021 14:23	Ready for Review
	<b>) )</b> 10	<ul> <li>items per page</li> </ul>				1 - 2 c	f 2 items 🖒

When the status reads "Ready for Processing", this indicates that the invoice is still being read and processed by the system. Many fields in the list view will contain placeholders at this time. Please be patient – the invoice will soon switch to "Ready for Review", which indicates the invoice has completed processing. At this time, many fields will be filled in, but will still need to be reviewed for accuracy.

TIP: You can continue entering invoices as the previously entered invoices process!



Click on the Ready for Review invoice to review its contents. The invoice details will appear below.

ase che	eck for errors a	nd verify the c	letail lines.								Vendor Template:	No temp
cation	ABC Care Cer	nter			•						1 of 2 pa	ges 🕨 🕨
ndor	Select Vendor				•	C 🍋						
voice To	otal * 1896.8	500									BUCKHE	AD MEAT & SI
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ference		Item	GL Code	U/M	Price	Qty	Total				5 A - A + O	5
	e No. 2	8 CS CS 1 1 /	GL Code	U/M	Price	Qty	Total			*	Account No.	PO Nu
ference	e No. 2		GL Code SELECT GL - Select GL Code	U/M EA - Each	Price \$18.95	Qty 8	Total \$151.60	Add	X Delete	*		PO Nor Ordered 8 CS 70 LB
ference ctions	e No. 2	8 CS CS 1 1 / / 8LB 8LB SCALLOP SCALLOP DRY DRY U/ 2 CS CS 1 1	SELECT GL -					Add	× Delete	•	Account No. Product No. 7031798	Ordered 8 CS
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Any fields that were unable to be gathered properly from the invoice will be marked with a red flag

You can correct these fields, then click the Update button to save your changes. Also verify the other fields, even if they were gathered by TIM, to ensure their accuracy.

**NOTE**: If your location or vendor information is not being read properly, check with your corporate team and ensure the addresses for your offline vendors are entered properly and up to date.

Invoices that have the text "DUPLICATE INVOICE" at the top may be a duplicate of another invoice uploaded using the Total Invoice Manager, or of an invoice entered via Offline Invoice Entry. Ensure that you are not entering a duplicate invoice before proceeding by checking the Transactions -> Invoices tab for any existing invoices with your invoice number.



When you are ready to submit the invoice upload, click the Submit button. The status of the invoice will change from "Ready for Review" to "Submitted".

## Email to Invoice

Procurement Partners customers who utilize the Total Invoice Manager feature have the option to email invoices into the system. With **Email to Invoice**, a user can post and create an offline entry directly from an email. Your Corporate Team can provide more information on this process.

**NOTE**: Every organization's specific email address will be unique. It will typically be in the format: <u>Invoices+[CompanyID]+[LocationCode]@partnerinvoices.com</u>.

Once Email to Invoice is enabled for your organization, you can send an email to your custom email address to create a new offline invoice, or you can provide your custom email address to the offline vendors directly for them to email the invoice right into the system. Emails that contain multiple invoice attachments will generate a separate invoice entry for each attachment.

Once the invoice is emailed in, it will appear on the Total Invoice Manager tab within a few minutes with the status of "Ready for Processing" – the invoice will soon switch to "Ready for Review", which indicates the invoice has completed processing. It will also contain a note with timestamp information for when the invoice was emailed. Complete the invoice check-up as defined previously in this document.

If you require any additional assistance, please contact the Procurement Partners support team at <u>helpdesk@procurementpartners.com</u>