

Install OCRDocs extension from AppSource

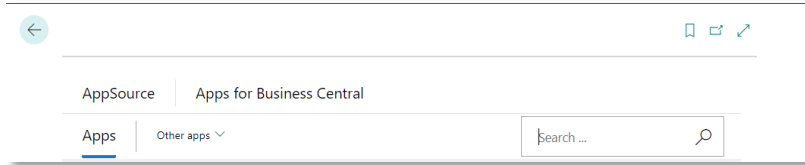
This document describes the steps how to install OCRDocs from AppSource and get started in 3 steps

Content

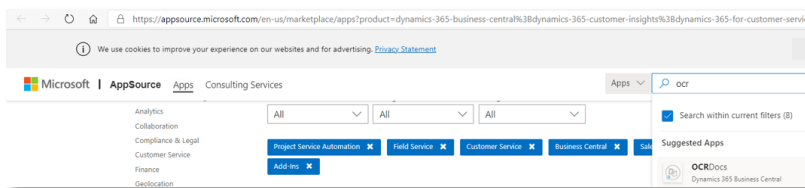
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1. Install OCRDocs from AppSource

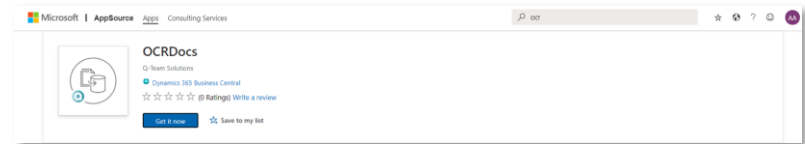
Go to the Microsoft AppSource and search for OCRDOCS



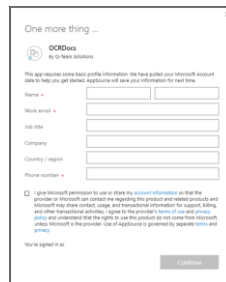
Select OCRDocs



Click "Get it now"



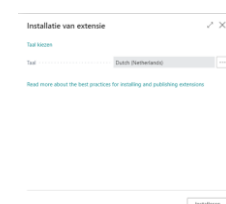
Enter the required information



Install OCRDocs in the desired environment

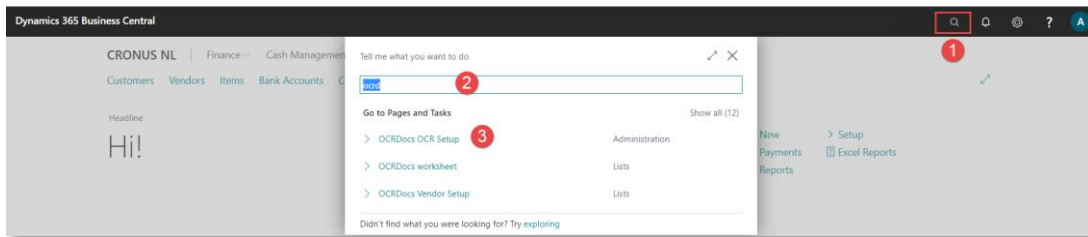


Select the desired language



2. Run the Setup

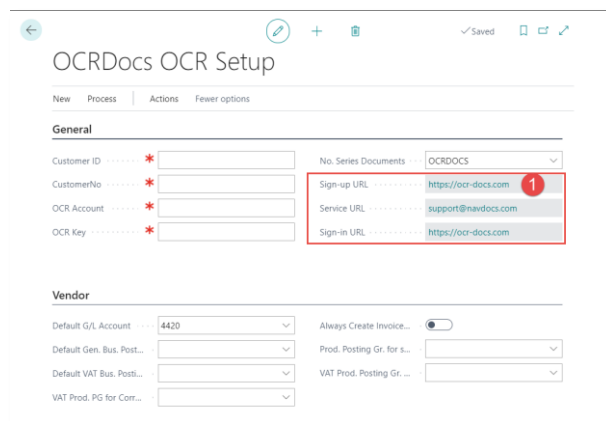
In Business Central select the Search button (1)



Type "ocrdocs" (2)

And select "OCRDocs OCR Setup" (3)

In the setup screen, references should be visible to ocr-docs.com



Create account

Click the Sign-up URL ocr-docs.com or www.ocr-docs.com to create an account.

Per company you need 1 unique account.

In our webshop, select the desired product and quantity

After verification you will receive an email with your company login information. Keep this email in a safe place!

Enter the Customer ID , CustomerNo, OCR Account and OCR Key that you received in the required fields.

Continue the setup:

- Default G/L Account (to be used for creating records in table Preferred vendor setup. This table is used to assign the default G/L account for invoice lines that will be created)
- Default Gen. Business Posting group: (used in the preferred vendor setup line when the selected G/L account has no Gen. Business Posting group filled in)
- Default VAT Bus. Posting Group: (used in the preferred vendor setup line when the selected G/L account has no VAT. Business Posting group filled in)

- VAT Prod. Posting Group for correction: (not required)
- Prod. Posting Gr. For setup: (used in the preferred vendor setup line when the selected G/L account has no Prod. Posting group filled in)
- VAT Prod. Posting Gr. For setup: (used in the preferred vendor setup line when the selected G/L Account has no VAT Prod. Posting group filled in)

Make identifications from setup screen

After filling in the setup screen, the Identifications and preferred vendor settings table can be populated. This can be achieved by clicking the action “Create identifications” button in the setup screen:

- For each vendor in the database several identification records will be created:
 - At least one of type “Identification group”: relation:
 - VAT number,
 - Bank account number
 - Email address
 - Home page
 - Telephone number
 - At least one of type “identification group”: document type
 - At least one of type “identification group”: document information
- For each vendor in the database one record in the preferred vendor setup table:
 - With the G/L account that was used for the last found posted vendor invoice or
 - With the G/L account that was setup in the setup table (field Default G/L Account)

3. Use OCRDocs

After creating identifications and preferred vendor setup records, the OCRDocs extension can be used.

It might be useful to assign the OCRDocs Role to the user but this is not required.

The general usage of OCRDocs consists of the following steps:

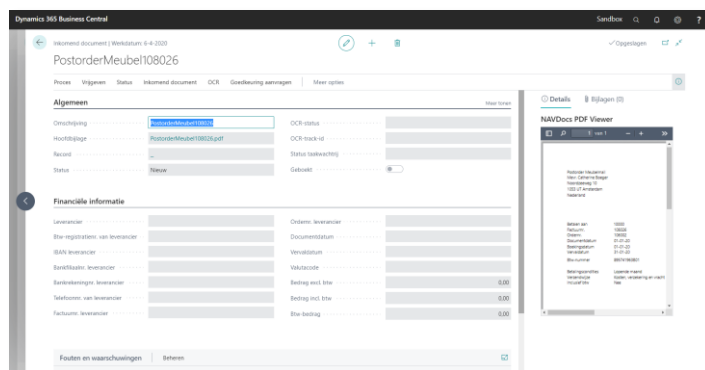
- Import documents in Incoming documents or OCRDocs worksheet
- Send these documents to the OCR Server
- Retrieve the OCR result
- Check and post the created (invoice) documents

Import documents in Incoming documents or OCRDocs worksheet

During the manual creation of an incoming document record, a record in the OCRDocs worksheet line with the same entry no will be created. There are 2 ways to create the incoming document:

- Click New - New
- Click New – Create from file

The result will be that an incoming document will be created with an attachment displayed:

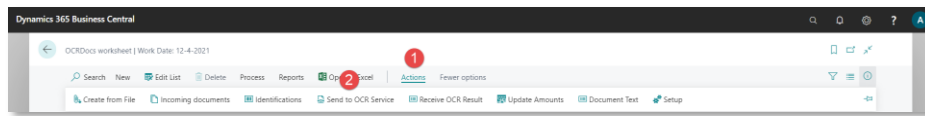


This attachment will also be visible in the OCRDocs worksheet line

An incoming document with attachment can also be created directly from the OCRDocs worksheet under Actions – Create from file

Send these documents to the OCRDocs OCR Service

All unprocessed documents will be visible in the OCRDocs worksheet with the OCR Status = empty and no remark in the field OCR Message. These unprocessed lines with status “empty” can be send to the OCRDocs OCR service.

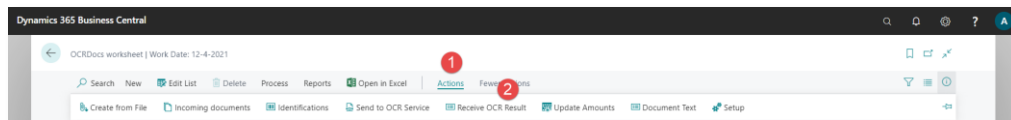


This can be achieved by clicking Actions (1), Send to OCR Service (2) in the OCRDocs worksheet. The following should happen:

- The document will be send to the OCRDocs OCR Service
- Now the OCR status should be changed to Sent
- a message will appear in the OCR Message field

Retrieve the OCR result

After sending the new documents to the OCR Service, the result can be retrieved. This can be achieved by clicking Actions, Receive OCR result in the OCRDocs worksheet.



The following should happen:

- if the OCR result is not available yet, the OCR message indicates this.
- If the OCR result is ready, the OCR Status field gets the status “Ready” for all lines with OCR result.
- The document text will be available
- If a corresponding identification exists:
 - a relation (vendor) will be assigned
 - an invoice will be created with lines according to the preferred vendor setup, retrieved document text and if relevant, posted purchase receipts

Check and post the created (invoice) documents

After the creation of the unposted invoice, the invoice should be checked.

The correct invoice can now be posted. Alternatively an approval process can be started before the invoice can be posted