**Purchase Invoice Capture**

# Introduction

iDocuments Intelligent Capture consists of 3 core components:

**Mailbox Scanner**

Installed on the server as a scheduled task – see “mailbox scanner” documentation

This can be taken WITHOUT the need of OCR and instead new invoices are fed into iDocuments but without any prepopulated information.

**OCR Processor**

Installed on the server as a scheduled task running in the background to extract invoice information from a PDF.

The PDF can either originate from the Mailbox Scanner (when enabled) or can be placed manually into the “to be processed” folder if no email extraction enabled.

Every file found, will be OCR’d but the results are highly dependent on the quality of the document and the rules declared (see below).

To obtain the best outcome the following guidelines can be followed:

* Use true digital copies where possible
* When scanning paper documents, do so at a high resolution ensuring the file is placed in the scanner correctly
* Hand-written note, highlighting of text and folding of paper should be avoided
* Using greyscale may improve the results
* Identifying text should be present and clear (see below rules)

**Rules manager**

Installed on client machines with access to the databases and document repositories this application allows users to load a PDF previously processed to link the file to a supplier and then define the location of the key information building a “template”.

Each supplier can have any number of templates for varying versions of invoices.

**Creating templates**

Please see <https://www.youtube.com/watch?v=SvjJR2DLQHs> for more details.