Invoice by Email p1

The system creates a unique email address for you to send invoices to.

Firstly, setup by **Emailing your example of invoice** to provider@capitalguardians.com with subject: Setup email invoice. Alternatively, **Setup yourself in page 3.**

Invoice should be: 1. PDF Digital 2. have a unique Customer Code on the invoice.

After setup, steps are the following:

• Setup your customer numbers (once-off) every customer Select Accounts > Edit

Ensure the unique **Customer Code** from your invoice appears on the **Accounts Billing ID** section. Add by selecting **Edit** in **Accounts**









B Confirm invoices

Follow link (logging in) to confirm invoices, alternatively, select **Batch > Email** the number of unconfirmed invoices will appear next to **Batch**

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Invoice by Email – SETUP yourself p1



You can follow these steps following or email provider@capitalguardians.com , our team will help to setup.

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🛃 Invoice	Supplier >> Spine Life Melb
🛃 Batch 🗸 🗸	Please send your pdf invoices to <u>testinvoice+6141@capitalguardians.com</u>
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📤 Upload	Invoice No. Account No. Name Amount Tax Description Date Category Document Kemarks Action No available emailed invoice to confirm.
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2 Upload an example of pdf invoice by clicking **Open**(digital pdf format, have a unique customer code)

Invoice Format Editor

Please upload a reference pdf invoice. Position the -ref- marker to capture a unique text that goes with the data. Position and resize the data marker to capture the appropriate data. Once done, save the format. You can choose to test the format to ensure that data are captured correctly.

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3 Drag and drop the geo-positioning references using the top yellow square for : et ACCOUNT NUMBER 000000 2000 02744 9972 NUMBER Account number reference 2000 02744 9972 BILL NUMBER Invoice number reference 108 3001 056 JMBER Total amount reference 108 3001 056 TOTAL DUE \$262.54 21 AUG 2015 Includes GST of \$20.59 Description 🕞 Open Test × Close Back Sav Conversion Complete Top ref box, must highlight the text that comes before the values being searched, The Bottom must highlight the value. 4 Setup **Description** to describe your service on customer statements Description ę 5 Save the template Save