

Kofax Invoice Automation

Invoice Portal Onboarding Install & Quick Start Guide

Version: 6.0.2

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The KOFAX logo is displayed in a bold, blue, sans-serif font. The letters are thick and closely spaced, with a clean, modern appearance.

Legal Notice

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Chapter 1

Introduction

This document guides you through the installation of the Invoice Portal supplier-onboarding plugin in connection with Kofax Invoice Automation 6.0.2 and later and briefly describes how to use it.

Note that this plugin is only meant for use in countries where the Invoice Portal is available for use.

For more information on the general use and benefits of the invoice Portal, log in at <http://www.fakturaportalen.se/en/> and see the help provided there.

Related documentation

A full set of the documentation for Kofax Invoice Automation can be found online [here](https://docshield.kofax.com/Portal/Products/en_US/KIA/6.0.2-9nw1fk802p/KIA.htm): https://docshield.kofax.com/Portal/Products/en_US/KIA/6.0.2-9nw1fk802p/KIA.htm

Getting help for Kofax products

Kofax regularly updates the Kofax Support site with the latest information about Kofax products.

To access some resources, you must have a valid Support Agreement with an authorized Kofax Reseller/ Partner or with Kofax directly.

Use the tools that Kofax provides for researching and identifying issues. For example, use the Kofax Support site to search for answers about messages, keywords, and product issues. To access the Kofax Support page, go to www.kofax.com/support.

The Kofax Support page provides:

- Product information and release news
Click a product family, select a product, and select a version number.
- Downloadable product documentation
Click a product family, select a product, and click **Documentation**.
- Access to product knowledge bases
Click **Knowledge Base**.
- Access to the Kofax Customer Portal (for eligible customers)
Click **Account Management** and log in.

To optimize your use of the portal, go to the Kofax Customer Portal login page and click the link to open the *Guide to the Kofax Support Portal*. This guide describes how to access the support site, what

to do before contacting the support team, how to open a new case or view an open case, and what information to collect before opening a case.

- Access to support tools

Click **Tools** and select the tool to use.

- Information about the support commitment for Kofax products

Click **Support Details** and select **Kofax Support Commitment**.

Use these tools to find answers to questions that you have, to learn about new functionality, and to research possible solutions to current issues.

Chapter 2

Prerequisites

- ReadSoft Invoices 5.8 SP2 or later
- An Invoice Portal account - click **Become a member** on the Invoice Portal home page.

Chapter 3

Installing the Invoice Portal plugin in Kofax Invoice Automation

The functionality to onboard suppliers directly in Invoice Automation can be installed either in connection with or after installing Invoice Automation. It should be installed on every client on which the Manager and/or Verify module is installed.

In the installation package, navigate to and double click `Plugins\IPOnboarding\Invoice Portal onboarding plugin setup.msi`. You can either keep the default installation location or specify a different one.

Once installed, the plugin, Invoice Automation Invoice Portal onboarding plugin, is found in the Control Panel under Programs and Features. The functionality needs to be configured (see "Setting up the Invoice Portal supplier-onboarding plugin in Kofax Invoice Automation").

Chapter 4

Removing the Invoice Portal plugin in

If you want to remove the plugin completely, you need to right click it in Programs and Features in the Control Panel and select **Uninstall** for each computer on which the plugin is installed in connection with Invoice Automation Manager or Verify modules, selecting **Modify**, and deselecting the **IPOnboarding**.

Otherwise, if you just want to keep Invoice Automation from trying to connect to the Invoice Portal, you can simply comment out or remove the `PluginN` row for the `IPOnboarding` plugin in `eilocal.ini` as in these examples:

```
;*****  
;*      Manager      *  
;*****  
[Plugins::eimngr]  
Plugin1=Common  
Plugin2=DBMaintenance  
Plugin3=ERPImport  
Plugin4=InvoiceSelection  
Plugin5=AutoValue  
;Plugin6=IPOnboarding  
  
;*****  
;*      Verify      *  
;*****  
[Plugins::eiveri]  
Plugin1=Common  
Plugin2=AutoValue  
;Plugin3=IPOnboarding
```

Just keep in mind that if you do this, you need to adjust the numbering for any plugins (`PluginN` where `N` is a number) that are listed after the `IPOnboarding` plugin. Gaps are not allowed in the numbering sequence in the Plugin list.

Chapter 5

Setting up the Invoice Portal supplier-onboarding plugin in Kofax Invoice Automation

When Invoice Portal supplier-onboarding functionality is installed for Kofax Invoice Automation (see "Installing the Invoice Portal plugin in Invoice Automation"), the following section is added to `eiglobal.ini`, and it must be configured.

```
[IPOnboarding]
InvoicePortalURL=https://web.fakturaportalen.se
Credentials=
UploadReminderDays=2
```

InvoicePortalURL flag

The `InvoicePortalURL` setting is specified automatically when installed and should not be changed unless instructions to do so are received from support or an Invoice Automation consultant.

Credentials flag

The credentials for the corresponding account need to be added in order to connect to Invoice Portal supplier-onboarding services.

To get the key for this:

1. Log in to the Invoice Portal account that will be used with the plugin.
2. Click **Settings > Member account**.
3. Under **Member API keys**, generate an API key by clicking **Add**.
4. Immediately copy the key from the **API key** box and paste it in the `eiglobal.ini` file next to `Credential=`.
5. Save the file.

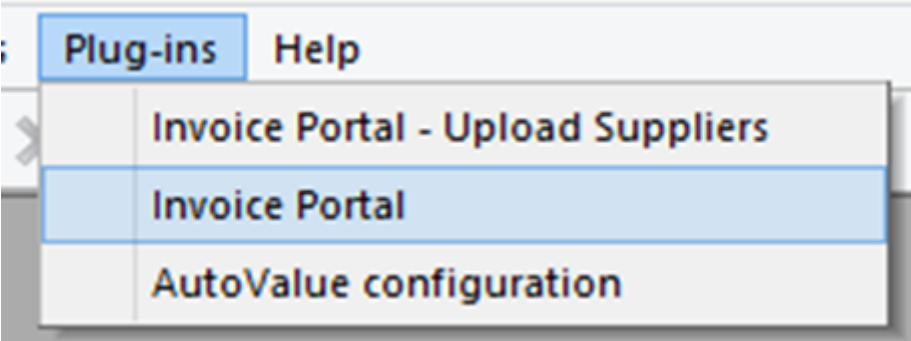
UploadReminderDays flag

This specifies the number of days that will pass before the Upload suppliers dialog is automatically displayed when the Manager module is started.

Note The dialog is not displayed if there are no new suppliers to upload.

DisablePopup = 1

This is an additional flag that can be specified to stop the pop-up dialog from being displayed automatically in the Manager module when it opens. However, it can still be displayed using the menus in the Manager module.



Note The dialogs are also displayed automatically if corresponding actions need to be handled.

Chapter 6

Warning when trying to connect

If you get the following message when the plugin tries to connect to the Invoice Portal, add it to the trusted list by clicking Add.



Note This message may be displayed on a machine that has a stricter security policy, such as a machine with Windows Server installed.

Chapter 7

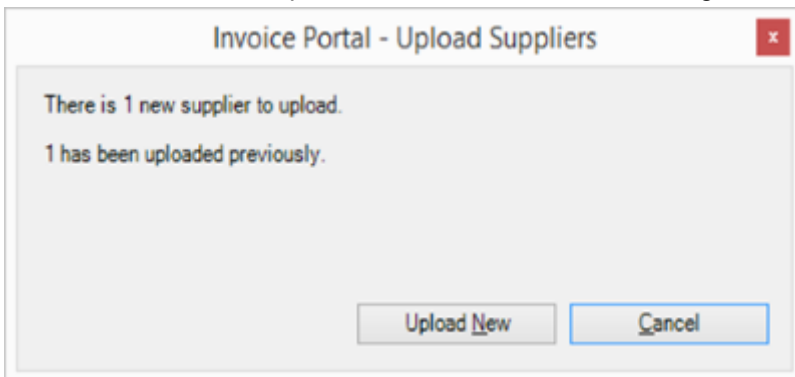
Invoice Portal Plugin Quick-start Guide

This guide briefly shows how to use the Invoice Portal supplier-onboarding plugin once it has been correctly installed and configured in connection with Kofax Invoice Automation (see previous section).

How it works

The first time an invoice is approved for a supplier in Kofax Invoice Automation, information on the supplier is collected by the supplier-onboarding plugin (without the knowledge of the Verify operator).

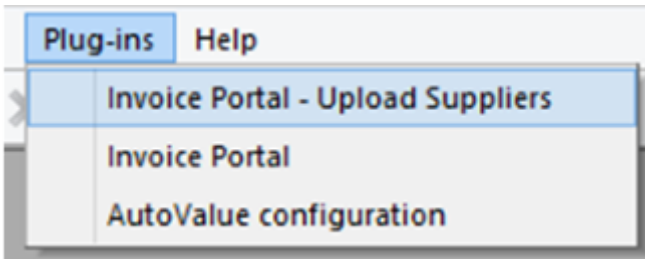
Depending on what is specified for the `UploadReminderDays` flag in `eiglobal.ini`, and if the first invoice for a new supplier has been approved, the **Upload Suppliers** dialog is automatically displayed when an administrator opens the Invoice Automation Manager module.



It provides information on how many new suppliers can be uploaded to the Invoice Portal (if any) and how many have been uploaded previously.

- If there are new suppliers to upload, the administrator can click **Upload New** to upload information on new suppliers to the Invoice Portal.
- If there is no information for new suppliers, the **Upload New** button is grayed out.

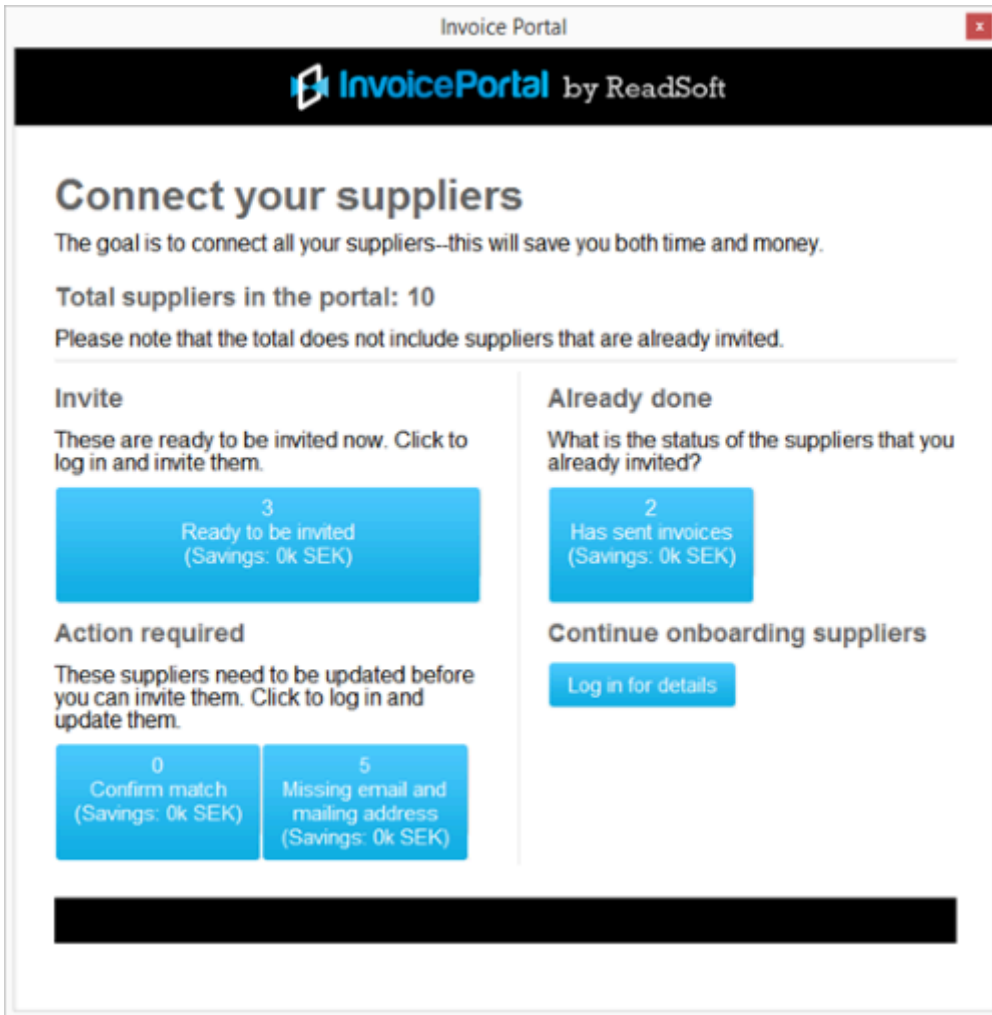
The dialog can also be opened manually in Invoice Automation using the Invoice Portal menu item:



Supplier-status popup

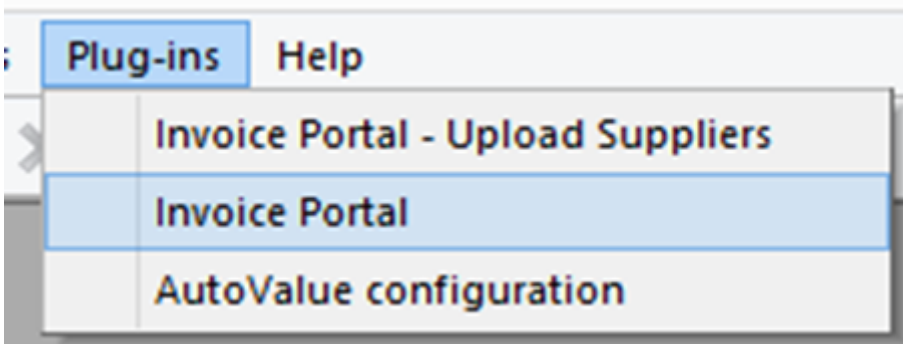
A popup that shows the current status for suppliers in the Invoice Portal is displayed automatically in the Manager module when things like the following occur:

- A supplier has accepted the invitation
- Some information needs to be adjusted
- A new supplier has been created that needs to be approved
- Etc.



The automatic display of the popup can be turned off (see "[DisablePopup = 1](#)") on page 10

However, the popup can be displayed manually at any time using the menu item:



How to get suppliers onboard in the Invoice Portal

This section describes what needs to be done to get your suppliers onboard using the Invoice Portal plugin for Kofax Invoice Automation. Except for the adding of suppliers, all of the information provided here applies to the Invoice Portal web interface when you are logged in to the correct account.

Before you can start receiving invoices from suppliers, you need to connect them using the following steps:

Add suppliers - suppliers need to be added to the Invoice Portal. This is done using the supplier-onboarding plugin for Kofax Invoice Automation, or they can be added manually directly in the Invoice Portal web interface. See previous sections on how to install and configure the plugin and on how it works for more information.

Invite suppliers to join the Invoice Portal - if you are a free member, you must upgrade to a higher membership level to invite suppliers using an external operator. These suppliers are listed when you click **More to reach**.

Confirm supplier information - some suppliers require more processing before you can invite them. In these cases, you might need to confirm the supplier match or [add missing contact information](#).

Check supplier status - At any part of the onboarding process, see which stage your suppliers are in.

Remind suppliers -



- [Remind suppliers that you already invited them.](#)
- [Remind suppliers that accepted your invitation but have not started sending electronic invoices.](#)

Invite suppliers

You can invite the suppliers that have been uploaded to the Invoice Portal using the onboarding plugin for Kofax Invoice Automation to send invoices through the Invoice Portal. You can send invitations by email (free) or postal mail (at extra charge).

Note Some suppliers cannot be invited until you confirm their match. Also, suppliers need to have either an email or a mailing address. If they do not, you will not be able to invite them. The Invoice Portal informs you when you need to add missing contact information.

To invite suppliers, complete the following steps in the Invoice Portal when you are logged into the correct account:

1. Click **Suppliers > Summary**.
2. Click the **Ready to be invited** button.
3. Edit the invitation text by clicking the **Invitation text** button.
4. Select which suppliers to invite by checking the box next to their supplier ID. To select all suppliers, click **All** in the **Select** dropdown menu. To search for a specific supplier, type the search criteria in the text field.
5. Specify whether to send the invitations by email or postal mail when both options are available. The **Send by** column indicates how a supplier can be invited: , , or either if both options are available for the supplier.

6. To invite suppliers by email, specify the deadline and click **Send email**. To invite them by postal mail (at extra charge), specify the deadline and click **Send mail**.


A confirmation email is also sent to you; it provides a summary of how many suppliers were invited and other information. The suppliers you invited are now removed from the Ready to be invited list.

Confirm the supplier match

The matching function help keeps your supplier list up to date.

The Invoice Portal searches among all members and connected operators for information that corresponds to your suppliers. If a match is found and the information is identical, you do not need to do anything. If the match is uncertain, you must manually confirm it before you invite the supplier.


To invite suppliers, complete the following steps in the Invoice Portal when you are logged into the correct account:

1. Click **Suppliers > Summary**.
2. Under **Confirm**, you can see whether you have any matches to confirm.
3. Click **Confirm match**.
4. Find the supplier and click the **Edit**  button.
5. In the list of possible matches, select the one that corresponds to the customer you selected. If none of the suggestions are correct, select **None of the suggested**.

Add missing contact information

Before you can invite suppliers, they need to have an email address, a mailing address, or both. If they do not, you will not be able to invite them. The Invoice Portal informs you when you need to add missing contact information.

To add missing information for suppliers, complete the following steps:

1. Click **Suppliers > Summary**.
2. Under **Confirm**, click the **Missing email and mailing address** button.
3. Select a supplier and click the **Edit**  button.
4. Add an email address.
5. Add a mailing address.
Tip: If the supplier is Sweden-based, type the supplier's organization number or Bankgiro account number in the **Identifier** field under **Party identifiers**, and their name and address is filled in automatically.
6. Specify or change other details, if applicable.
7. Click **Save**.

Check supplier onboarding status

To see in which stage of the onboarding process your suppliers are, complete the following steps:

1. Click **Suppliers > Summary**.
2. Under **Check suppliers**, click **Check and update**.



3. Then you can:

- Search for a particular supplier by typing their name in the search box at the top and clicking **Filter**.
- Search for suppliers in a particular step of the onboarding process by selecting the stage and clicking **Filter**.
- Filter the results based on how the suppliers were invited (email or letter) by selecting how they were invited and clicking **Filter**.
- Filter the results based on which deadline the suppliers were assigned by specifying the deadline span and clicking **Filter**.
- Sort suppliers based on different criteria by clicking the column heading.

Remind suppliers you have already invited



Sometimes suppliers need to be reminded to sign up as members and accept your invitation to start sending invoices through the Invoice Portal.

To send reminders to these suppliers, complete the following steps:

1. Click **Suppliers > Summary**.
2. Under **Remind**, click the **Already invited** button.
3. Search for a particular supplier by typing their name, organization number, or other information and pressing **ENTER**.
4. If applicable, filter the list of suppliers by specifying the invitation time span.
5. Click **Invitation reminder** to edit the reminder text.
6. Select which suppliers to remind.
7. Specify whether to send the reminders by email or postal mail when both options are available. The **Send by** column indicates how a supplier can be reminded: , , or either if both options are available for the supplier.
8. To remind suppliers by email, specify the deadline and click **Send email reminder**. To remind them by postal mail (at extra charge), specify the deadline and click **Send postal mail reminder**.
9. To automatically send a reminder to the supplier, select **Auto reminder**.

Remind suppliers who accepted your invitation but have not started sending electronic invoices

After suppliers accept your invitation and set up an account, sometimes you need to send them a reminder to start sending invoices through the Invoice Portal.


1. Click **Suppliers > Summary**.
2. Under **Remind**, click the **Has accepted your invitation** button.
3. Search for a particular supplier by typing their name, organization number, or other information and pressing **ENTER**.
4. Click **Startup reminder** to edit the text.
5. Select which suppliers to remind.
6. Specify whether to send the reminders by email or postal mail when both options are available. The **Send by** column indicates how a supplier can be reminded: , , or either if both options are available for the supplier.

7. To remind suppliers by email, specify the deadline and click **Send email reminder**. To remind them by postal mail (at extra charge), specify the deadline and click **Send postal mail reminder**.

Delete suppliers

Deleting a supplier does not delete the invoices they have sent to you, and they are still able to send you new invoices.

To delete a company from your list of suppliers, complete the following steps:

1. Click **Suppliers > Summary**.
2. Under **Check suppliers**, click **Check and update**.
3. Find the supplier and click the **Delete**  button.

General information

General information on how to use all of Invoice Portal's functionality can be found in the help within the program itself.