

Kofax ReadSoft Collector

Installation and Quick Start Guide

Version: 6.5.0

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ReadSoft Collector installation guide

Overview

This document guides you through the installation of ReadSoft Collector 6.5 in connection with ReadSoft Invoices 5.8 SP2 or later.

Notice: Although the intention of this guide is to describe the process to implement and configure all of the required components in as much detail as possible, certain Windows information dialogs may appear that are not covered. If no information is specifically provided, select default options or choices that are appropriate to company policy and personal judgment.

System requirements

To ensure production quality and speed, the requirements below need to be met. The requirements assume that ReadSoft Collector and ReadSoft Invoices are the only programs running on the workstation or server. If other programs are running at the same time, the requirements for each product must be added to the ReadSoft Collector and ReadSoft Invoices requirements.

Installation requirements	
Operating system	ReadSoft Collector can be installed on: <ul style="list-style-type: none"> • Microsoft Windows 10 • Microsoft Windows 8 • Microsoft Windows 7 • Microsoft Windows Server 2019 • Microsoft Windows Server 2016 • Microsoft Windows Server 2012 and 2012 R2 • Microsoft Windows Server 2008 R2 • Microsoft Windows Server 2008 (32-bit or 64-bit version)
SW requirements	<ul style="list-style-type: none"> • .NET Framework 4.7.2 • INVOICES 5-8 SP2 or later • Microsoft SQL Server 2005, 2008, 2012, 2014, 2016, or 2019*
Administrator requirements	<ul style="list-style-type: none"> • If installed, admin rights on ReadSoft Invoices Manager and Interpret module workstations • Admin rights on SQL Server
User requirements	The user must have sufficient permissions to: <ul style="list-style-type: none"> • Retrieve email from mail servers • Store mail-attachment files on the disk • Store log files in the log folder

Mail account	Mail account using IMAP, MAPI, EWS, or EWS with Oauth mail protocol **
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** Latest Service Pack and updates recommended. For ReadSoft Invoices and Microsoft SQL Server HW and SW system requirements please read the ReadSoft Invoices and SQL Server documentation.*

*** An IMAP, MAPI, EWS, or EWS with Oauth mail protocol must exist to be able to retrieve invoices by email using ReadSoft Collector. Email rules need to be set up in your mail client to automatically move the mail messages containing invoices to the ReadSoft Collector source folder. We recommend that you create the source, processed, and error folders in the mail box before ReadSoft Collector is installed.*

Important note!: When specifying a MAPI email account in a ReadSoft Collector input configuration, the person doing the configuration must be logged in as the person whose profile will receive incoming mail. Domain or local administrator rights are not sufficient.

ReadSoft products ReadSoft Collector can be used with

ReadSoft Collector 6.5 can be installed and used with ReadSoft Invoices 5.8 SP2 or later.

Install ReadSoft Collector with ReadSoft Invoices

INVOICES 5.8 SP2 or later needs to be installed first. See *ReadSoft Invoices Installation Guide Eng.pdf* found in the ReadSoft Invoices installation package.

The ReadSoft Invoices modules that ReadSoft Collector needs to be installed with depend on which functionality is to be used:

- To use the ReadSoft Collector software together with ReadSoft Invoices to collect invoices by email (attached image formats only), perform the steps below to install ReadSoft Collector on every computer where ReadSoft Invoices Manager and Interpret modules are installed:
- If ReadSoft Collector is to be used with ReadSoft Invoices to process XML invoices (either separately or in combination with normal image-based invoices), whether they are gathered by email or retrieved from a folder, perform the steps below to install ReadSoft Collector on all computers where any ReadSoft Invoices modules are installed.

Download ReadSoft Collector 6.5 installation files






Note that to be able to do the following, you must have an account and a valid serial number for the product from Kofax. If you do not have an account, you can easily create one.

1. Navigate and log in to the Kofax Electronic Fulfillment page (<https://delivery.kofax.com>).
2. If the product has not yet been registered, click **Add software**, add the serial number you received from Kofax for the product, and click **Submit**.
3. Navigate to **ReadSoft** in the list of products, select **Collector**, and click **Download**.

Install ReadSoft Collector software

During the installation procedure, you are prompted to answer some questions. In most cases, you can click **Next** to use the default settings.

The contents of the Collector installation package is as follows:

-  **Installation**
-  **Collector**
-  **Documentation**
-  **LogReader**
- ▷  **SampleCollectorPlugin**

1. To install Collector, put the installation package, downloaded in the previous section, in a temporary folder, and open `COLLECTOR Installation.exe` in the **Installation** folder.
2. The installation setup starts. Click **Install** to continue.
3. Click **Next** on the **Welcome** page.
4. Click **Change** in the **Destination Folder** dialog to specify the installation folder if you require something other than the default location. Otherwise, click **Next**.
5. Click **Install** in the **Ready to install ReadSoft Collector** dialog.
6. You are notified if an existing version is found on the computer, and it is uninstalled before installing the new version if you click **OK** to continue.

Notes:

- No settings are lost. Just remember the ReadSoft Collector database name so that you can use it again when the program is upgraded.
- Remember to start the database maintenance tool to check if you need to upgrade the database after ReadSoft Collector has been upgraded.
- When the **Completed** dialog is displayed, click **Finish**.

Create or connect to the ReadSoft Collector database

1. Open the Database Maintenance Tool (click Start > All programs > ReadSoft > COLLECTOR > Database Maintenance Tool).
2. Type in the database-connection settings, and either click Create database or Upgrade database depending on whether this is the first time Collector is installed.
3. Then click Test connection. A message is displayed indicating whether the connection was successful or not.

Note:

The database settings are read from `COLLECTOR.INI`. When updating the database settings (i.e., database server name, database name, and login information), it will be written into `COLLECTOR.INI` located in the ReadSoft Invoices Global Path folder. This is normally only done once when installing and setting up Collector. For more information please see the Collector help.

For information on how to set up a job to use Collector for email input, see “Setting up Collector for use with ReadSoft Invoices”.

Collector Database Maintenance...

Database server: [.] [Browse]

Database name: Collector

☐ Use Windows authentication \ integrated security

User name: sa

Password: [masked]

Version: 6.4.2.13263

[Refresh]

[Create database] [Upgrade database]

[Update COLLECTOR.ini] [Test connection]

[Help] [Exit]

Upgrade from an earlier Collector database

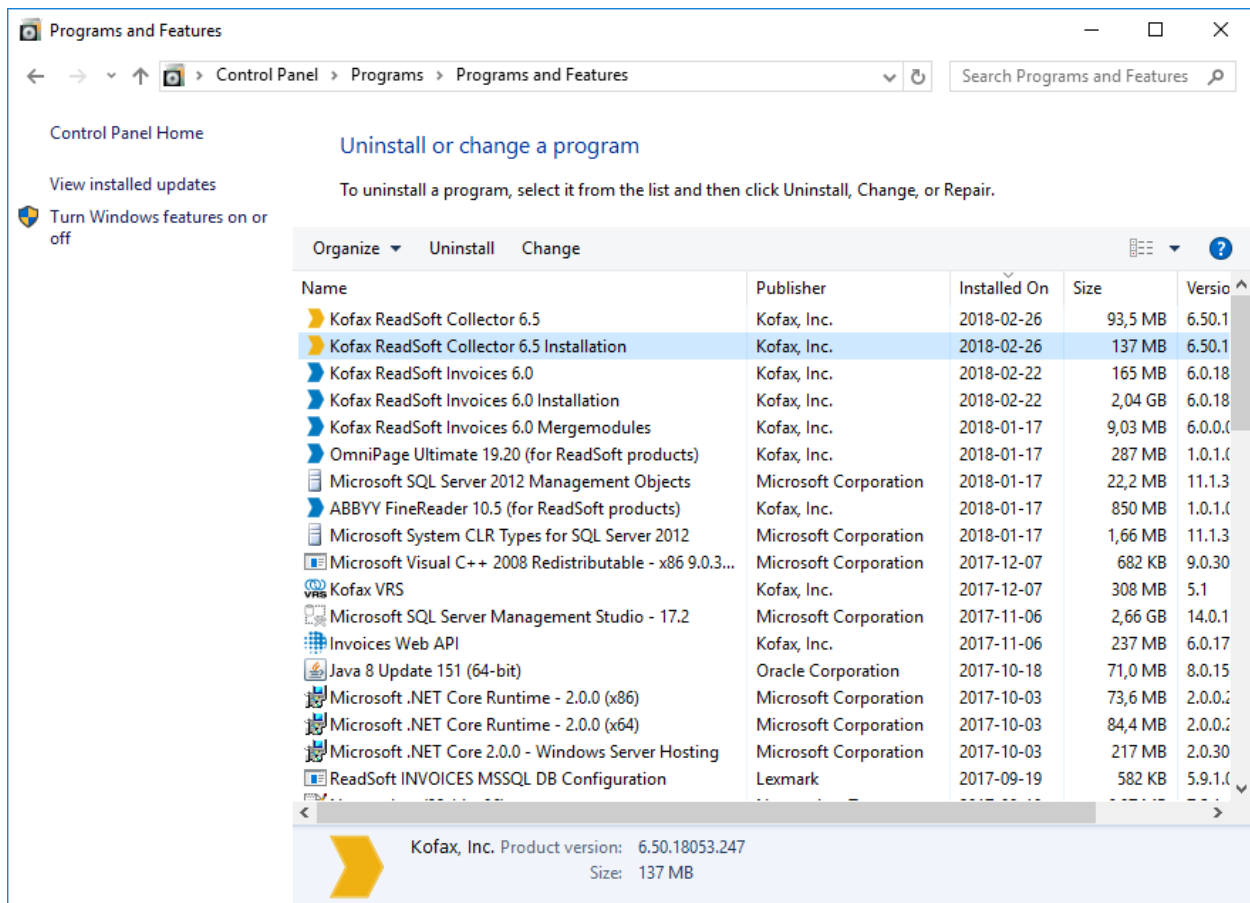
If you want to use a Collector database that was created in a version prior to COLLECTOR 6-4, we recommend manually running the script, `CleanUpXFields.sql`, either before or after upgrading the database to remove any orphaned XField fields that may make the removal of XML invoice definitions from the system impossible.

This database maintenance script and instructions on how to use it can be found in the installation in this folder:

```
\ReadSoft\COLLECTOR\DBScripts\Maintenance\CleanUpXFields.sql
```


Remove ReadSoft Collector

ReadSoft Collector can be removed by using **Uninstall or change a program** in the **Control Panel**.



Add or Remove Programs in Control Panel (Windows Server 2016)

Note! The database itself has to be removed manually in SQL Server Management Studio. Just remember to make a backup copy of the database before if needed.

ReadSoft Collector quick-start guide

This guide briefly shows how to set up Collector with the default settings and get it up and running.

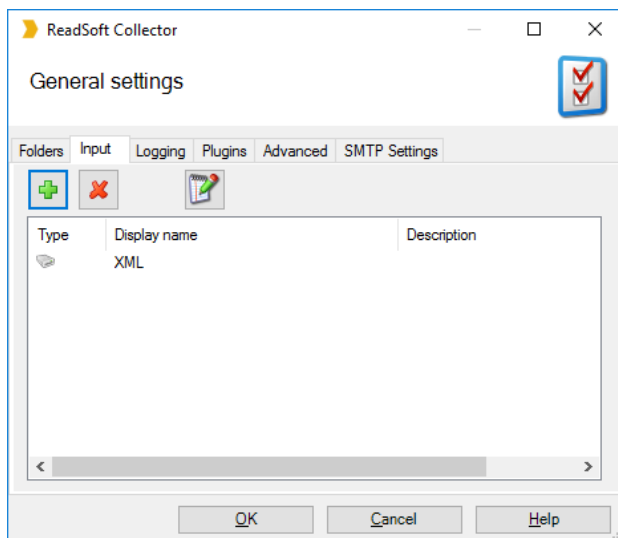
Set up Collector for use with ReadSoft Invoices


ReadSoft Collector is configured in two steps:

1. First, input-source configurations (for IMAP, MAPI, and/or from file, for example) need to be defined and saved in Collector. Other general settings concerning where email attachment files are saved, how logging and error reporting are handled, and if additional plugins should be used also need to be specified. All of these settings are stored in the ReadSoft Collector database.
2. Secondly, along with the configuration of other ReadSoft Invoices job-related settings, the *Input sources* defined in the first step above, are selected in the ReadSoft Invoices job when the add-on/data source extension is setup.

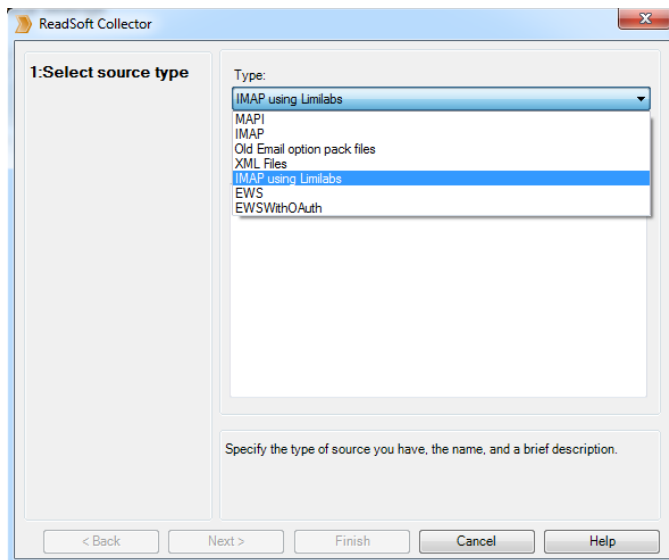
Add input sources

This section describes how to add input sources to the **Input sources** tab of the Collector General settings dialog (see page 22) so that they can be selected in an ReadSoft Invoices job.



Click  in the dialog to add one or more of the input sources that can be configured:

- MAPI
- IMAP using Limilabs
- IMAP
- Old EMAIL Option Pack files
- XML Files
- EWS
- EWSWithOAuth



Configure an input source that retrieves email using MAPI


To configure an input source using MAPI:

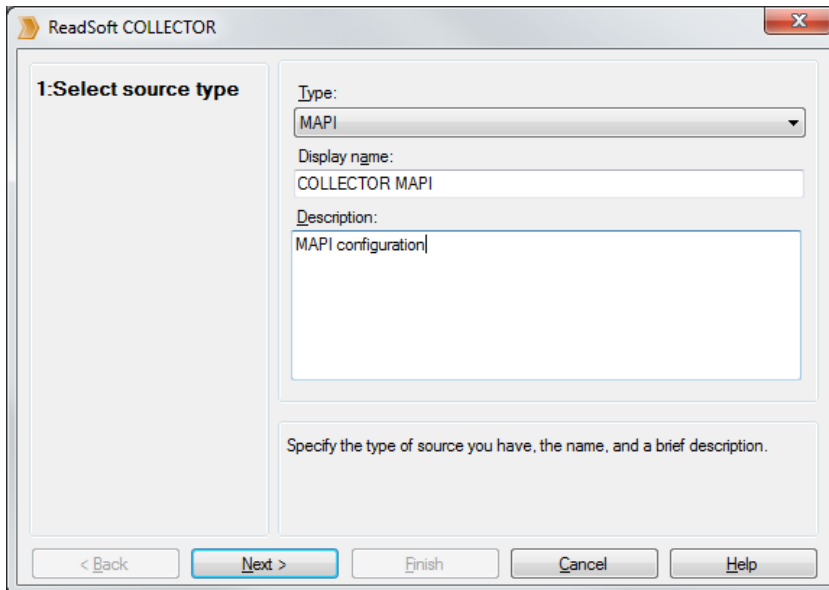
1. Log in to the computer using the same account as the one that will be used by the Interpret module. If you are planning to run Interpret as a service, make sure that you configure it to use a specific domain account.

Note: Domain or local administrator rights on the computer where the configuration is being set up are not sufficient. You must be logged in with the account that will actually receive the incoming mail.

2. For ReadSoft Invoices, open the Manager module and select the **Plugins > ReadSoft Collector** item in the main menu.

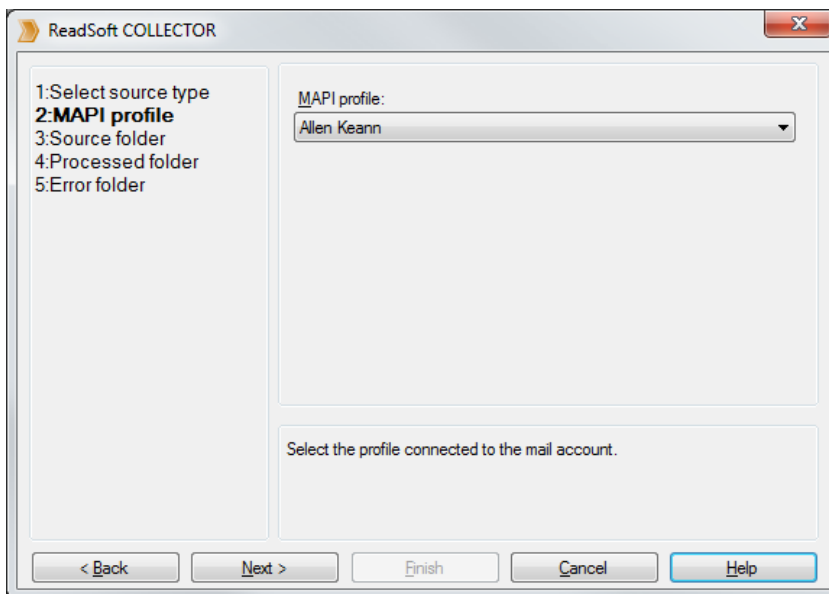


3. Select the **Input sources** tab, and click .
4. Select MAPI in the **Type** drop-down list in the **Select source type** dialog.
5. Type a name for the configuration in the **Display name** box and add a brief description describing what the configuration is used for (such as Collector MAPI and MAPI configuration). The information entered here will be visible later in the **Input source** list of the Collector General settings dialog when the input source has been saved.



Click **Next**.

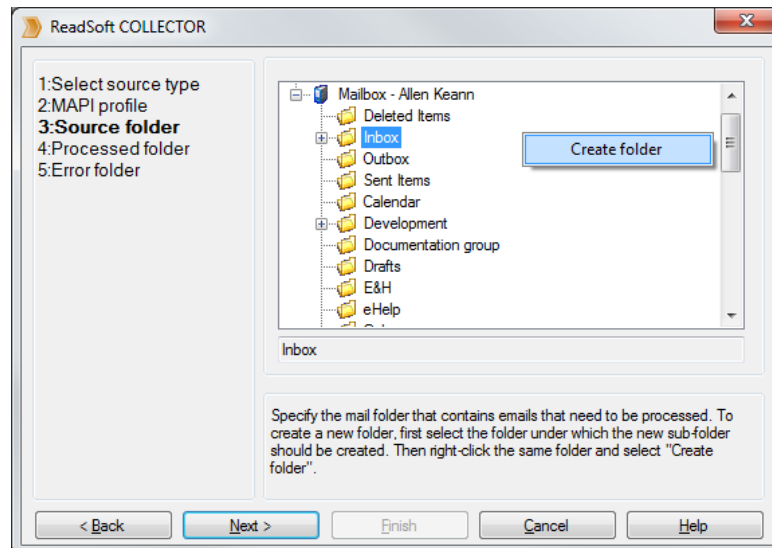
6. In the **MAPI profile** dialog, select the profile that should be used with the input-source configuration (this must be the profile that will receive the incoming mail):



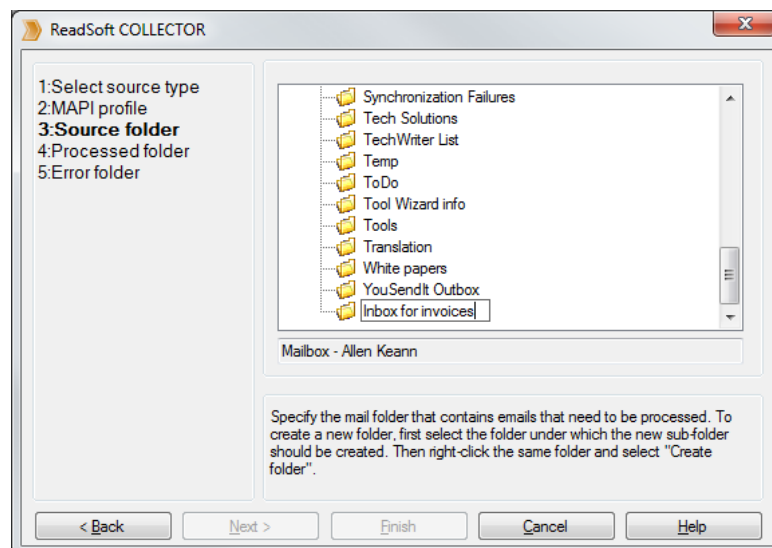
Click **Next**.

7. The folders that are available in connection with the selected profile are displayed in the **Source folder** dialog.
 - Click a folder to see if it has any sub-folders. In that case, a + sign appears before the folder name. Click it to expand the sub-folders.

- You can select an existing folder directly in the interface, or if you want to create a new sub-folder, right-click the folder under which you want the new sub-folder, and select **Create folder**.



Then type in the name for the new folder.




- Do the same for the **Processed**, and **Error** folders, and then click **Finish**.

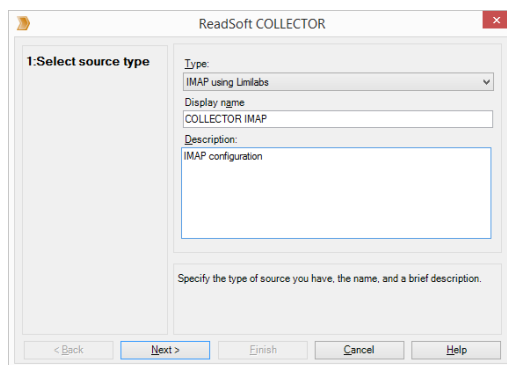
The *Processed folder* is where the processed email messages are stored. The *Error folder* is where email messages with errors are stored.

Configure an input source that retrieves email using IMAP

Note that **IMAP using Limilabs** is the recommended option for the following procedure in as much as **IMAP** will be removed in a future version.

To configure an input source using IMAP:

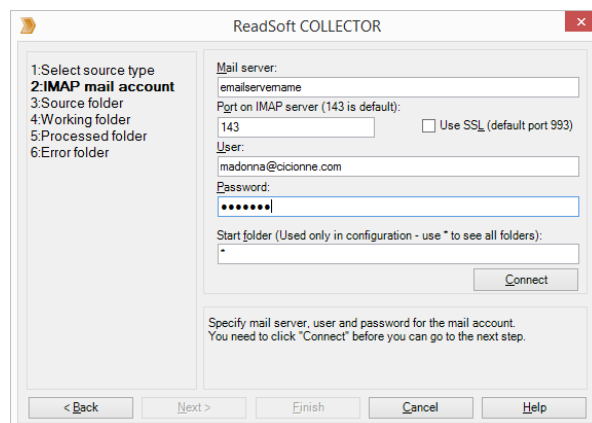
1. Open the ReadSoft Invoices Manager module and select the **Plugins > ReadSoft Collector** item in the main menu.
2. Select the **Input sources** tab, and click .
3. Select **IMAP** or **IMAP using Limilabs** from the **Type** drop-down list, and type an appropriate name and description for the input source. Click **Next**.



4. In the **IMAP mail account** dialog, specify the IMAP mail server and user details for the account that will be used to retrieve emails.

Note! To be able to configure an input source using IMAP on an Exchange server, the user must be specified using this format *netbios domain name/domain user account/mailbox alias*.

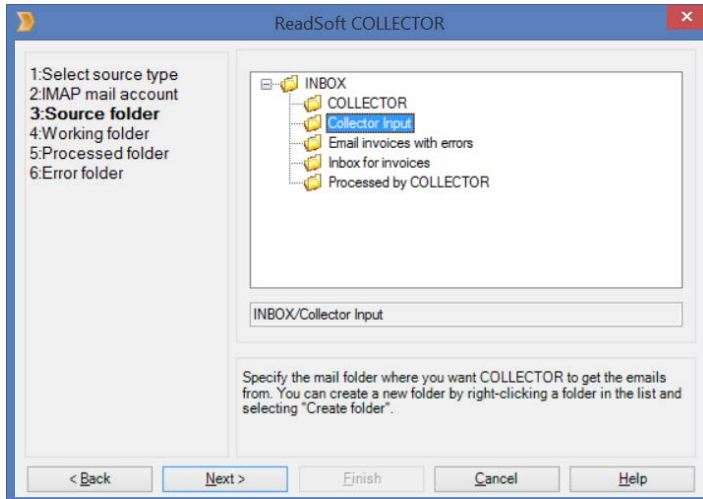
5. Verify the connection by clicking **Connect**. You will only be able to proceed to the next step if the credentials are entered correctly and the connection is successful.



Note: If there are many folders to sort through on the mail server, you can use the **Start folder** setting as a filter to quickly sort to the folders of interest. If you named the folders *Collector input*, *Collector processed*, and *Collector errors* as subfolders of the *Inbox*, for example, you could type in **Collector** so that only those folders appear in the next dialog.

Click **Next**.

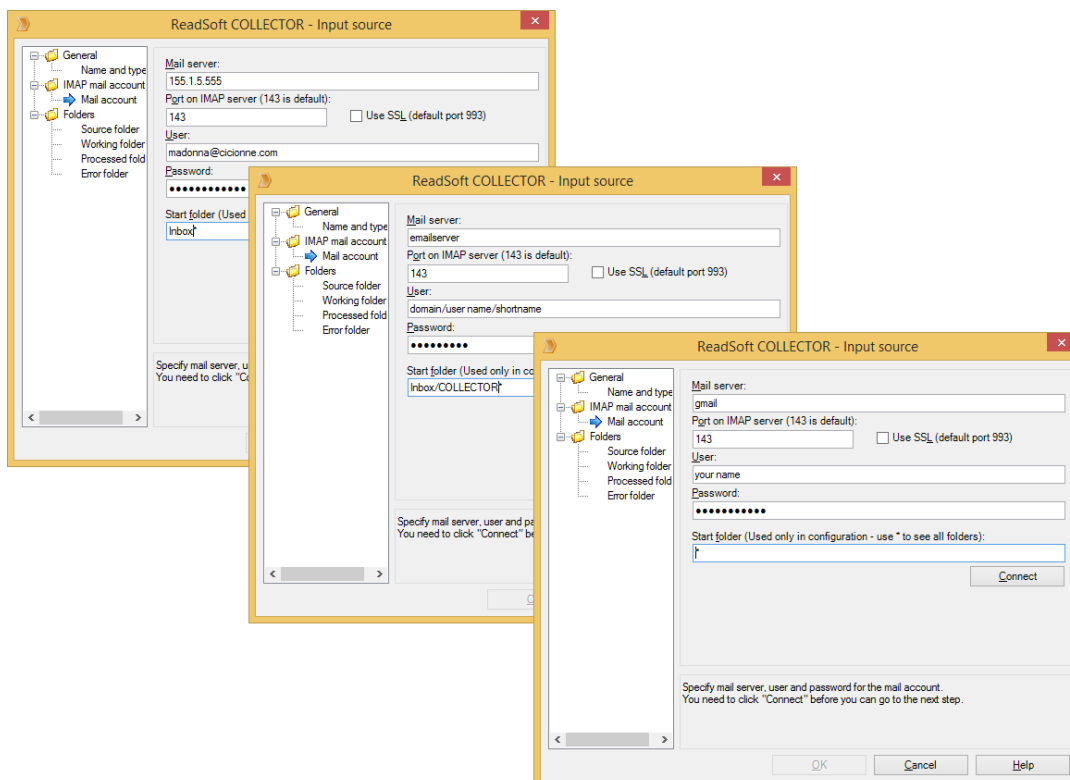
6. Specify the **Source, Working, Processed, and Error folders** in the same way as was described for a MAPI input source configuration on page 14.



7. Click **Finish**.

Examples of IMAP configurations

Since the results can vary depending on the account/server, here are a few examples of what the resulting IMAP input configurations can look like.



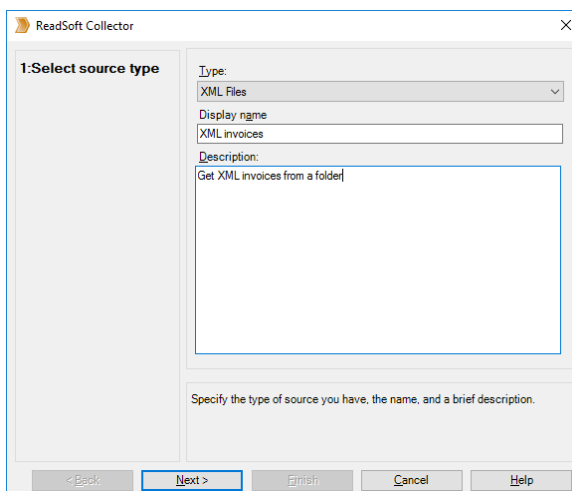
Configure an input source to retrieve XML invoices from a file folder

This functionality was developed to retrieve XML invoices, but it does not matter if the folder contains XML or image-based invoices, or both. Collector will use the appropriate logic to process the invoices correctly regardless of which invoice types are present.

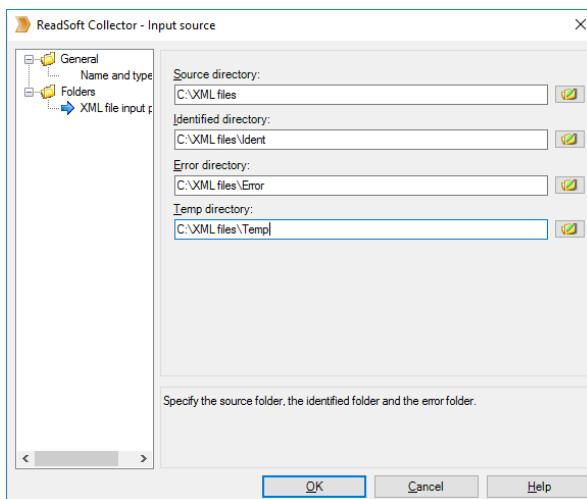
1. Open the ReadSoft Invoices Manager module and select the **Plugins > ReadSoft Collector** item in the main menu.

2. Select the **Input sources** tab, and click .

3. Select **File** from the **Type** drop-down list, and type an appropriate name and description for the input source. Click **Next**.




4. Use the browse button to navigate to the **Source directory**. By doing so, the **Identified**, **Error**, and **Temp** directories are filled in automatically. Alternatively, you can manually type in the paths to the different folders.

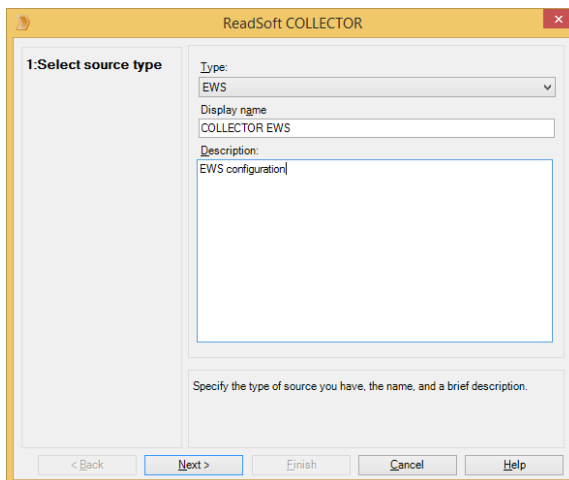


Click **Finish**.

Configure an input source that retrieves email using EWS

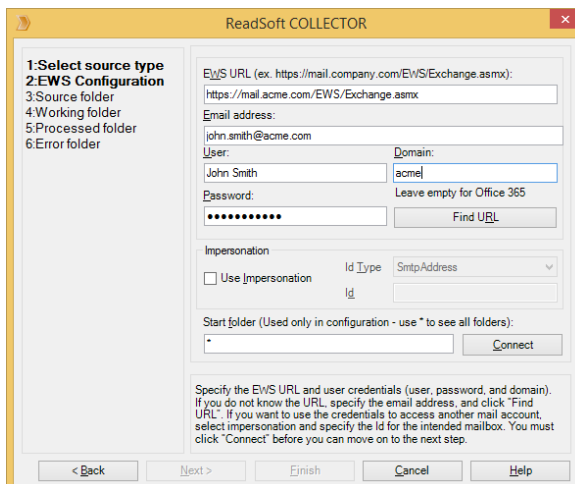
To configure an input source using EWS:

1. Open the ReadSoft Invoices Manager module and select the **Plugins > ReadSoft Collector** item in the main menu.
2. Select the **Input sources** tab, and click .
3. Select **EWS** from the **Type** drop-down list, and type an appropriate name and description for the input source.



Click **Next**.

4. Type the email address, user, domain, and password information in the appropriate boxes and click **Find URL**.



Click **Next**.


5. Specify the **Source**, **Working**, **Processed**, and **Error** folders in the same way as is described for the MAPI configuration.
6. Click **Finish**.

Configure an input source that retrieves email using EWS with OAuth

To configure an input source using EWSWithOAuth:

1. Open the ReadSoft Invoices Manager module and select the **Plugins > ReadSoft Collector** item in the main menu.



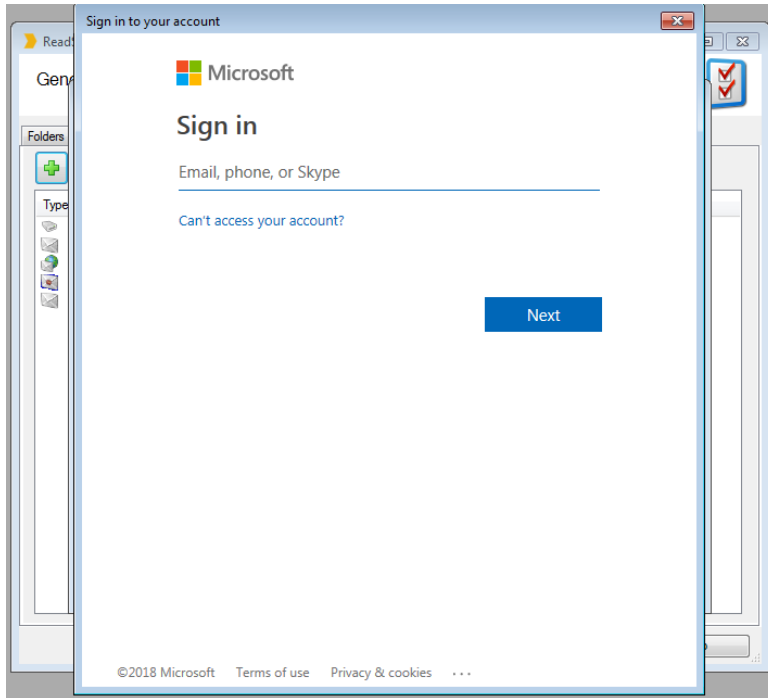
2. Select the **Input sources** tab, and click .
3. Select **EWSWithOAuth** from the **Type** drop-down list, and type an appropriate name and description for the input source.

Click **Next**.

4. Type the address of the **AAD instance** (Azure Active Directory), the **Tenant ID** (your Azure AD tenant domain), the **Client ID** (application ID that was generated when the application was registered in the Azure portal), the **Redirect URI** (the URI that was created when the application was registered in the Azure portal), and the **Resource Server** (API server used to access the user's information) information in the appropriate boxes and click **Find URL**.

Note that if Resource Server is left blank, the resource server for Office365 is used.

5. You are prompted to sign into the account specified for the resource server such as in the following in connection with Office365:



Once the login has been validated successfully, the **EWS URL** box is populated with the correct address, and the **Connect** button becomes available. Click **Connect**.

Click **OK** in the message box notifying you that the connection was successful. Then click **Next** in the ReadSoft Collector **EWS Configuration** dialog.

6. Specify the **Source**, **Working**, **Processed**, and **Error** folders in the same way as is described for the MAPI configuration.
7. Click **Finish**.

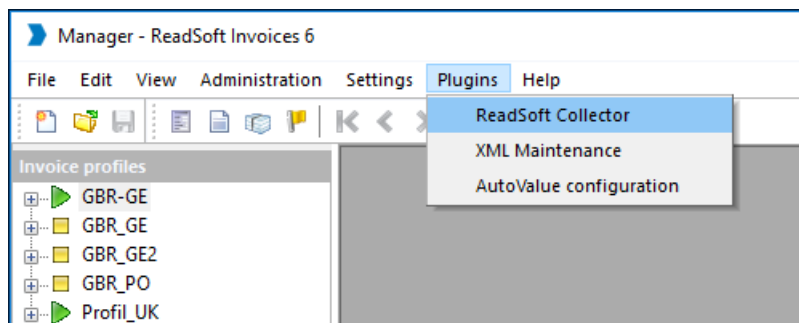
Configure Collector's General settings for ReadSoft Invoices

The following general settings need to be specified to determine how ReadSoft Invoices handles certain aspects of the Collector job regardless of which *input source* is selected in the ReadSoft Invoices job:

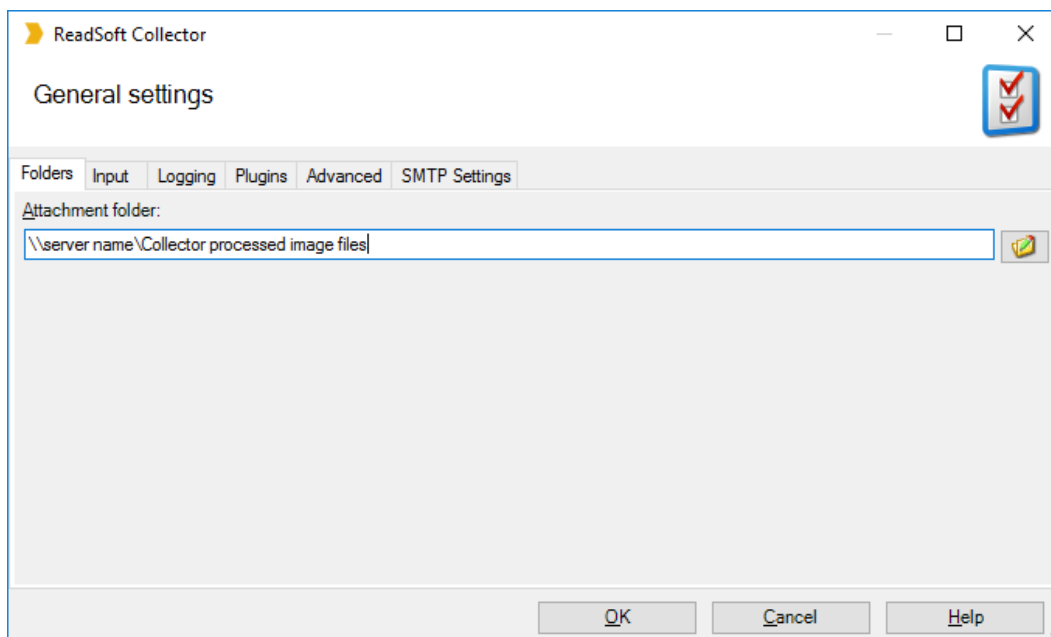
- The folder where images or email attachments are stored after processing in ReadSoft Invoices.
- Input sources – they need to be specified to be visible here (see below for more details)
- Logging options
- Plugin options

Access configuration dialogs in ReadSoft Invoices

To access the dialog where Collector is configured in ReadSoft Invoices, select the **Plugin > ReadSoft Collector** menu item.



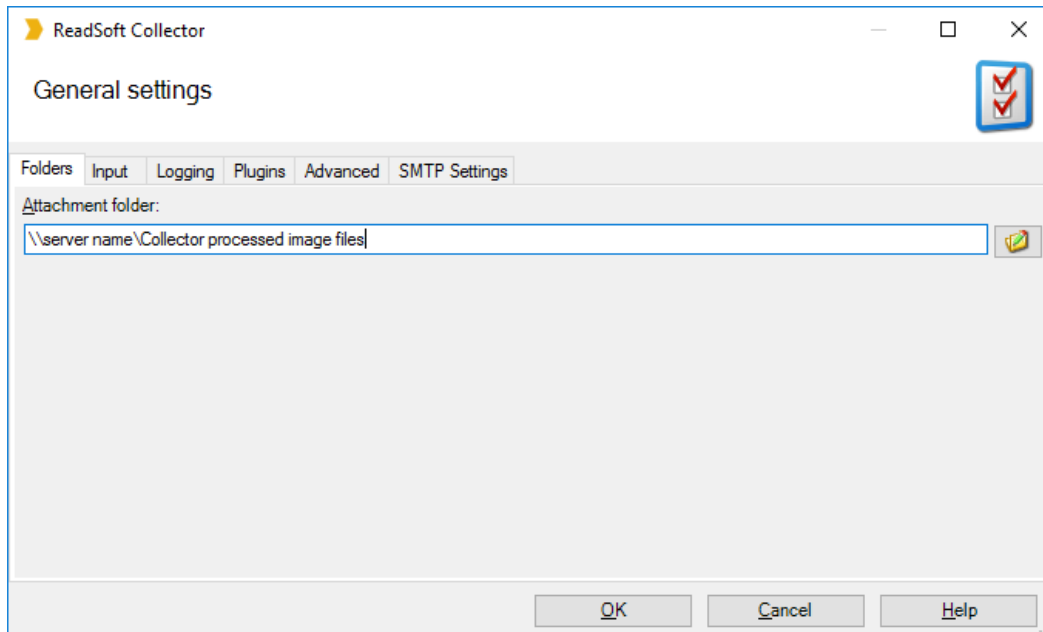
This is what the configuration dialogs look like:



ReadSoft Collector configuration dialogs in ReadSoft Invoices

Specify where to put email attachments for processing

Under **Attachment folder** on the **Folders** tab of the ReadSoft Collector General settings dialog, specify the folder where all documents are to be stored for processing by ReadSoft Invoices. If multiple ReadSoft Invoices modules are distributed on different machines, make sure that the path works for all modules (a UNC network path is recommended). All accepted attachment file formats will be placed here (all image file and XML file formats).



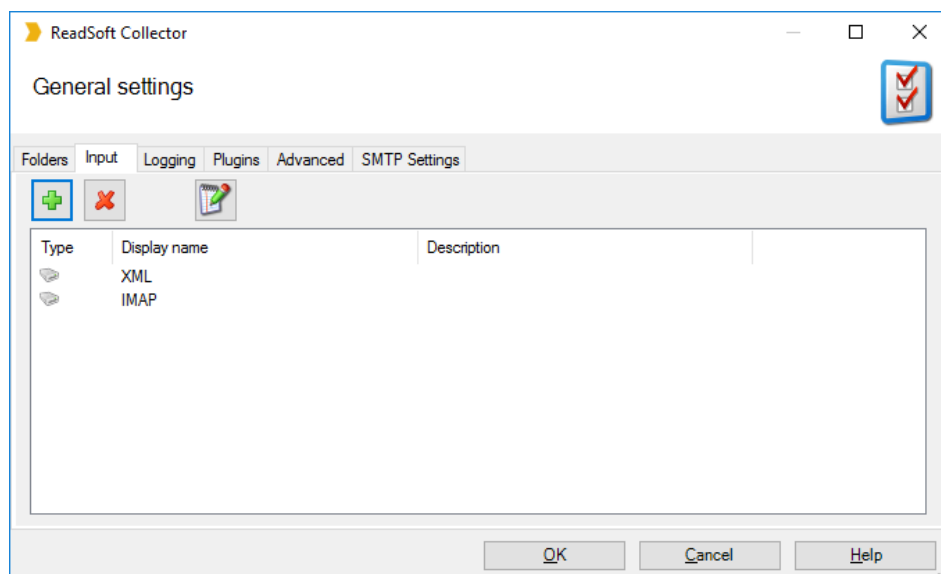
ReadSoft Invoices folder-configuration dialog

Notes!

- This does not need to be specified if the input source is **File** or **Old Email Option Pack files**.
- The account that runs the ReadSoft Invoices module(s) must have read and write access rights to this folder. This is especially important when you are running a module, such as Transfer, as a service, since by default, the Local System account does not have rights to read / write to network locations.

Select the input source configuration

The *Input source* tab lists all available configurations. If the list is empty, one or more input sources must be added to the list before Collector can be used in an ReadSoft Invoices job (see “Adding and specifying Collector input sources” on page 10 for more information).

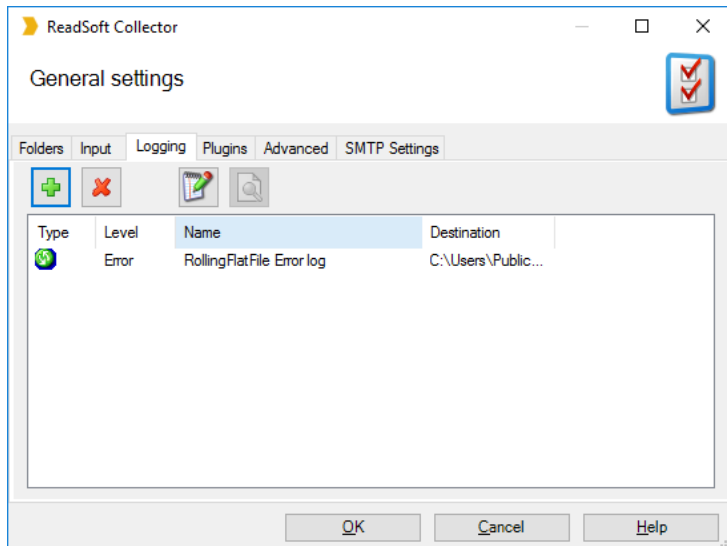


ReadSoft Invoices input-source configuration dialog

When retrieving files by email, rules should be applied to incoming email to automatically move email messages, which contain invoices that are to be processed in ReadSoft Invoices, to the correct folder used by the corresponding Collector input source. Please see your IMAP/MAPI or email-client documentation for instructions on how to do this.

Specifying logging options

Logging options are specified on this tab of the General settings dialog:



ReadSoft Invoices logging configuration dialog

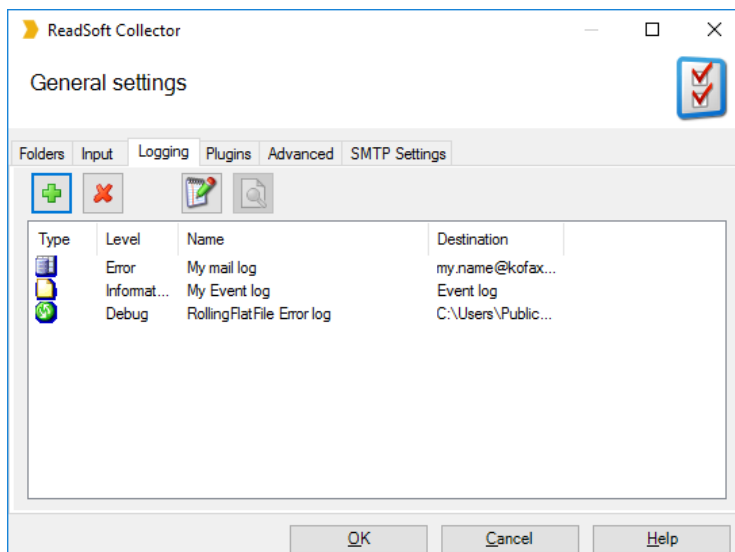
To add a logging option to the list, click

See Collector help for more information on the different log types and how to configure them..

Multiple logging options at the same time

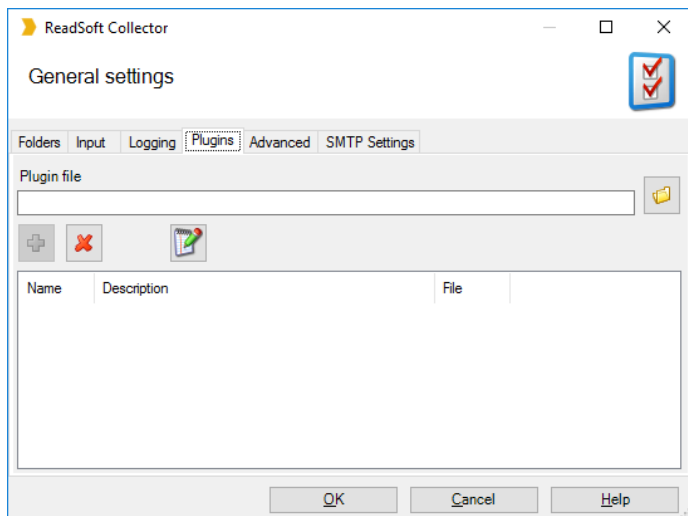
Several logging configurations can be used at the same time. All logs that are listed are generated when

related log information is triggered. Simply click to add additional logs or select the log you want to remove and click . See Collector help for more information on logging options.



Add customizations using the Plugins tab

To extend Collector's functionality, use this dialog to add your own plugins:

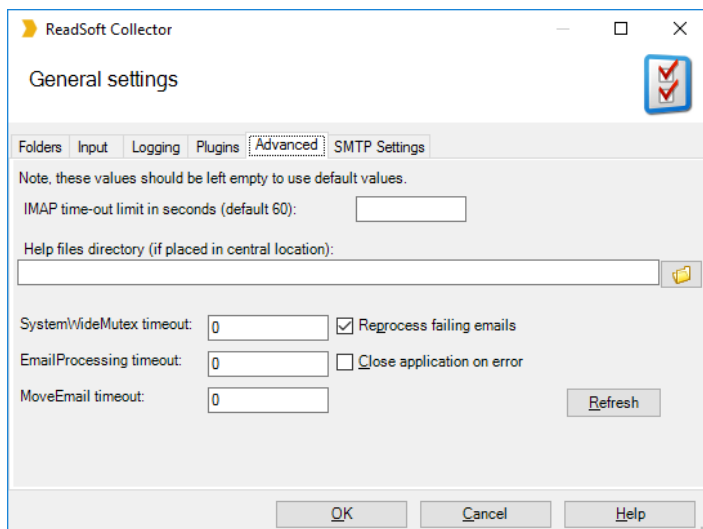


ReadSoft Invoices plugins configuration dialog

For more information on how to use plugins with ReadSoft Collector, please see the Collector help.

Troubleshoot errors that occur in the system

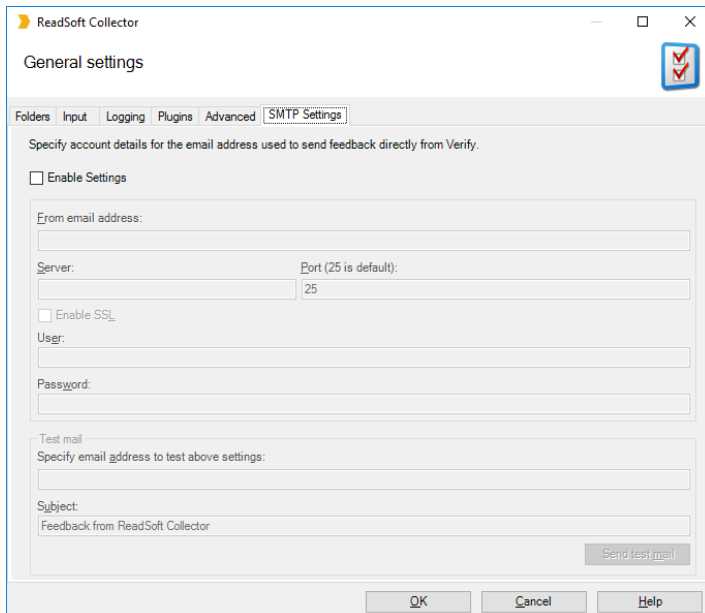
Use the settings in the Advanced tab of the General settings dialog to troubleshoot errors that occur or when the system becomes unstable. Note that the settings in this dialog should only be used if you are experiencing problems in the system.



See Collector help for more information.

Set up email account to send feedback on invoices

Use the settings on the SMTP tab of the General settings dialog in Collector to set up the email account used to send feedback on invoices directly from Verify in ReadSoft Invoices.

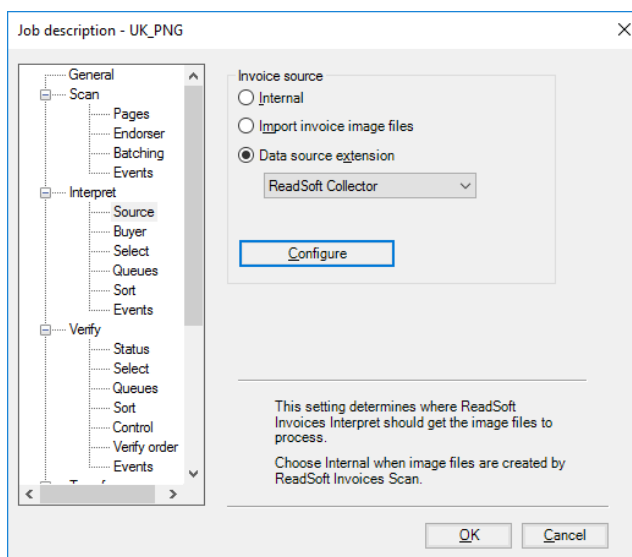


See [help](#) for more information.

Configure an ReadSoft Invoices job to use Collector as the input source

This section describes how to configure an ReadSoft Invoices job to use a Collector input source.

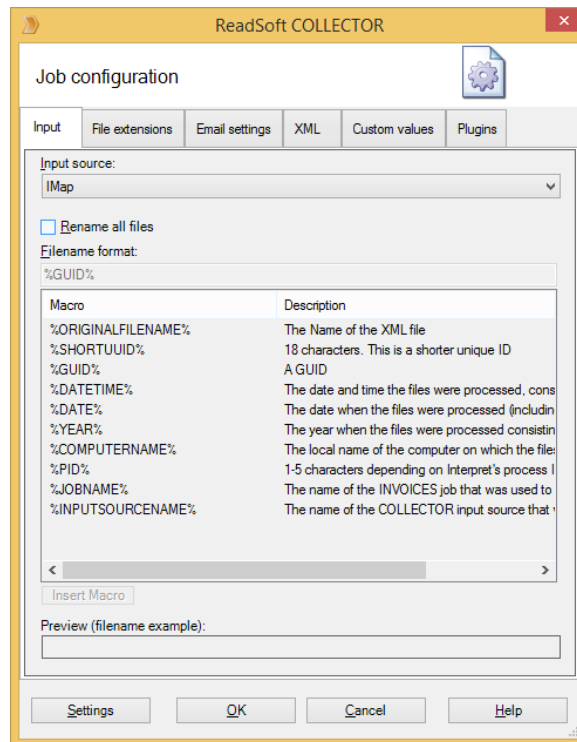
- Open the ReadSoft Invoices job in either the Manager or Interpret.
- Select the **Interpret > Source** dialog page, select **Data source extension**, and then select **ReadSoft Collector** from the drop-down list.



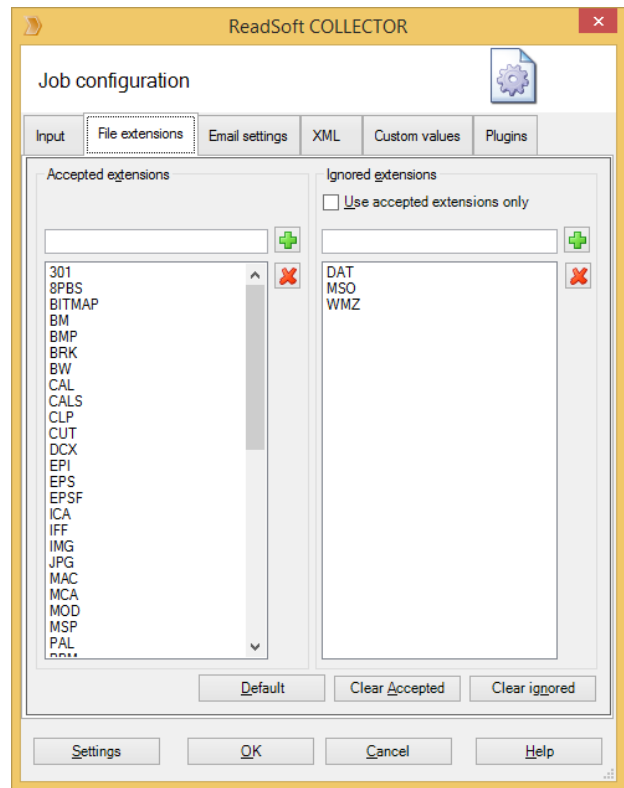
- Click **Configure**. In the **Input sources** tab of the dialog that is displayed, select one of the input sources that was specified earlier (see “Adding and specifying Collector input sources”) in the drop-down list.

If your archive or ERP system has particular filename requirements, your invoice files need to have short filenames or of fixed length, or you simply need to add a prefix, you can also rename all processed files for the current job by clicking **Rename all files** and then specifying the filename format using the macros provided or adding static text as needed.

A preview of whatever you specify for the filename is provided automatically at the bottom of the dialog.



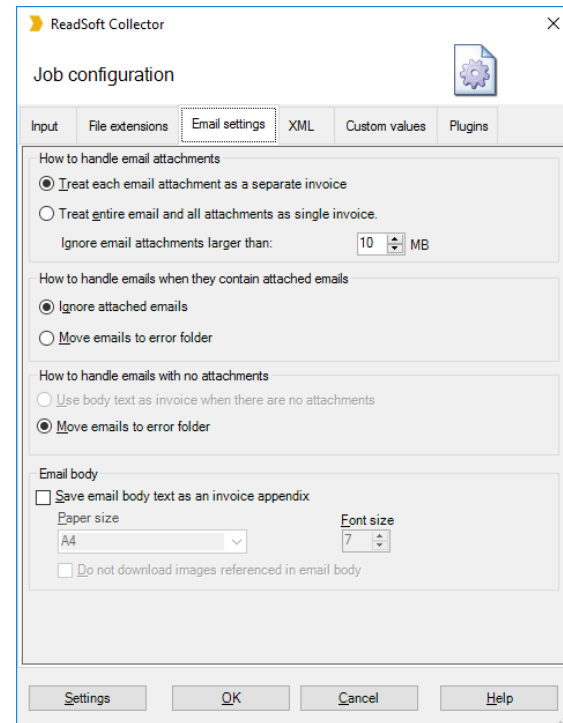
- Click the **File extension** tab and add file extensions for those file types that are accepted as valid invoice images/file types and those that should be ignored when files are received by email.
 - Accepted extensions** – the files are passed on for processing.
 - Ignored extensions** – nothing happens with these files (they are ignored). If the email has other attachments that are acceptable, they are passed on for processing.
- Neither accepted nor ignored** – emails with such attachments are sent to the error folder.



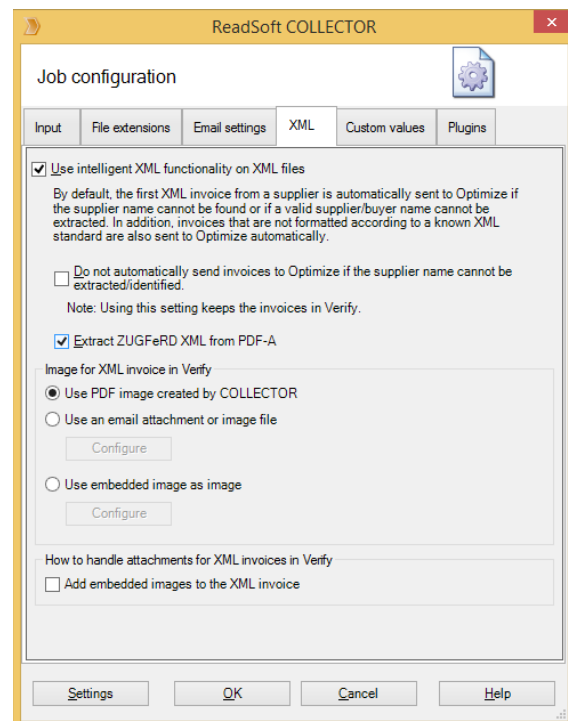
- Click the **Email settings** tab to specify if each email attachment is considered a separate invoice or if the entire email including all attachments are a single invoice.

You also specify how to handle emails if they contain other emails as attachments and if they do not have any attachments at all.

If you want to include the body text of the email as a part of the invoice information, click **Save email body text as an invoice appendix**. Here you can specify the paper size and decide if you want to download images referenced in the email body, as well.



- If Collector's intelligent XML functionality is to be used to process XML files, click the **XML** tab and ensure that **Use intelligent XML functionality on XML files** is selected.
- Do not automatically send invoices to Optimize: if the supplier name cannot be extracted/identified** – normally invoices for which the supplier cannot be extracted/identified are sent to Optimize meaning that they do not turn up in Verify. If this option is selected, these invoices are displayed in Verify even though the supplier cannot be extracted/identified. However, they cannot be approved in Verify since the supplier cannot be changed there for XML invoices. They will still need to be sent to Optimize to process them further.
- Specify which image to display in Verify for XML invoices. You can use the PDF image generated by Collector, you can use attached images or other images, or you can use embedded images if there are any. You can also decide here if you want to display all embedded images in Verify for the invoice.
- Click **OK**. When the job is run, ReadSoft Invoices retrieves emails and any attached invoices from the location specified in the input source selected in your job.



INI flags in eiglobal.ini that affect XML functionality

These flags in *eiglobal.ini* affect how XML functionality is used by Collector:

[Interpret] section

- XMLExtractimageReferencelImages
- XMLDoNotDeleteOriginalImage

See *INVOICES-INI-File-Help.chm* in the Bin folder of your ReadSoft Invoices installation for information on how to use these flags.

Buyer identification

If specified, this section specifies the order in which the fields are checked to identify the buyer and could contain entries like the following:

```
[BuyerIdentification]
BuyerField1=VATRegistrationNumber
BuyerField2=Name1
BuyerField3=BuyerNumber
...
```

If the above section is not specified in *eiglobal.ini*, these fields are checked by default to identify the buyer:

```
Vatregistrationnumber
Name1
Name2
Namesupplement1
Namesupplement2
```

Supplier identification

If specified, this section specifies the order in which the fields are checked to identify the supplier and could contain entries like the following:

```
[SupplierIdentification]
SupplierField1=SupplierNumber
SupplierField2=Name1
SupplierField3=VATRegistrationNumber
...
```

If the section above is not specified in *eiglobal.ini*, these fields are checked by default to identify the buyer:

```
SupplierNumber
Name1
Name2
Description
POBox
Street
StreetSupplement
PostalCode
BuyerAddressPostalCode
City
```

CountryCoded
CountryName
TelephoneNumber
FaxNumber
VATRegistrationnumber
TaxNumber1
TaxNumber2
CorporateGroupID

Processing XML files

XML invoices are handled in the same way as image files with these exceptions:

- You can specify that invoices from suppliers that have not been processed previously in Collector or invoices in the same situation that do not use a supported XML invoice standard are automatically saved in ReadSoft Invoices' Optimize module where the fields can be mapped manually using the new XML Field Mapper.

Note that if you use another plugin/solution to process XML files, this option should be deselected.

- The Collector input source used must be configured to process XML files.
 - XML files can be retrieved for processing directly from a file folder (see page 16).
 - If XML files are received by email, a job can process emails with either image or XML attachments, but not both in the same mail. If a single email contains both image and XML attachments, only the XML attachments are processed.

Note that even though the XML attachment is the only one processed, other mail attachments can be used as the image for the invoice in Verify (see page 27).

- When email is used as the input, a separate email input folder needs to be set up for each job to keep them separate.

See Collector help for more information on how to configure input sources. See ReadSoft Invoices help for more information on how to process XML files together with Collector.

Optimizing XML invoice definitions

Invoices from suppliers that are new to the system and those that deviate from the supported standards need to be optimized with their own invoice definition so that the system can learn the supplier details and process subsequent invoices from them automatically. XML invoice definitions are normally optimized in connection with the first invoice that is received from a supplier meaning that these invoices are not displayed in Verify until that is done. If you want to be able to see these invoices in Verify before they are sent to Optimize, you can stop Collector from automatically sending XML invoices from suppliers that have not been processed previously directly to Optimize (see "Configuring an ReadSoft Invoices job to use Collector as the input source").

Note, however, that this is not recommended since you will not be able to approve them in Verify anyway since the supplier/buyer cannot be adjusted there for XML invoices. You will have to send them to Optimize manually from Verify using the **Invoice > Send to Optimize** menu option in order to be able to process them further.

If you are afraid that you will miss invoices that do not show up in Verify, there are other ways that you can modify your system/processes to make them visible to you:

- Regularly check the Manager module for XML invoice definitions with status 99 (or custom status) that have invoices in the system.
- Regularly check Optimize (once a day/week, for example) for XML invoice definitions with status 99 or custom status that has been defined for them.
- Set up an Inbox in Verify to collect invoices that get stuck in the system.

SmartXML Quick-Start Reference

This section provides a quick-reference guide for how to get started processing XML invoices using Collector together with ReadSoft Invoices.

1. Gather at least one XML invoice (more is even better) from each supplier that you will receive XML invoices from.
2. Put the files in a folder called *TestMaterial*, for example. This folder is only used to store your invoice examples. You can alternatively have a separate folder for each supplier if you have multiple invoice examples from each and want to keep them separate from other suppliers for ease of identification.
3. Install ReadSoft Invoices 6.0 and create a database for it.
4. Install ReadSoft Collector 6.5 on all ReadSoft Invoices client machines (see the section that starts on page 6).
5. Create the database for ReadSoft Collector 6.5 (this can be installed in the same database with ReadSoft Invoices) – see page 8.
6. Define an input source that gets XML files from a folder, such as `XML_FilesToItrp` (see page 10 and page 16).
7. Define the remaining “General settings” in Collector (see page 17).
8. Define a job (see page 25).
9. Copy an XML invoice from Supplier A to the `XML_FilesToItrp` folder from step 6.
10. Start the Interpret job defined in step 8.
11. Review the invoice in Verify, and send the invoice for optimization by selecting the **Invoices > Save to Optimize** menu option.
12. Open the Optimize module and optimize the XML invoice definition taking note of the invoice’s identification number (*IDnr NNN*). That is, do the following for each of the sections of the invoice that contain fields (Supplier, Buyer, Fields, and Line items):
 1. Use best practices to optimize the fields (see “Best practices for optimizing XML invoices” in ReadSoft Invoices help).
 2. Add any fields that are missing in the layout (see “Adding missing fields to XML invoice definitions” in ReadSoft Invoices help).
 3. Remove any unnecessary fields (see “Removing unnecessary fields from XML invoice images” in ReadSoft Invoices help).
 4. Adjust the rule to find the value for the field (see “Creating rules to map values for fields in XML invoices” in ReadSoft Invoices help).
13. When you are satisfied with the optimization, save the definition, close the XML Field Mapper, and select **Yes** when asked if you are finished optimizing.
14. In the Manager module, delete the ReadSoft Invoices invoice definition that has the *IDnr NNN* identification number that was noted in step 12. If invoices have already been processed using this invoice definition, they also have to be deleted from the database before the invoice definition can be deleted.

Note: this step needs to be done any time you click **Save definition** in the XML Field Mapper even if nothing was changed.
15. Put the same file back in the *Input* folder, and run the same Interpret job again.

16. Look at the invoice in Verify. If everything appears to be correct, do the same process for invoices from Supplier B starting with step 9 above. However, if there are still things that need to be adjusted, return to step 12.
17. When invoices from all of your suppliers have been optimized using these steps, you can begin processing them in production by either putting all XML invoices that are to be processed in the `XML_FilesToItrp` folder or by processing emails that have XML attachments.