

Emailing and Scanning

Invoices Into BeanworksAP



Autocapture and Manual Capture Email Address

Each user in Beanworks is provided with two email addresses used by the application. One email can be used for auto capture and the other for manual capture.

Auto Capture

Invoices sent to the auto capture email address are automatically converted to invoices in BeanworksAP overnight. It includes the header details with: Vendor, Invoice and PO number (where applicable), Invoice Date and Due Date, Subtotals, Totals and Taxes.

When using the auto capture process your invoices are ready for you the next morning. You will find them in the application under the **In-Progress tab with the status New**. We recommend using this time saving method whenever possible and only leave the proprietary account/department/etc. coding to be filled out by your team.

Manual Capture

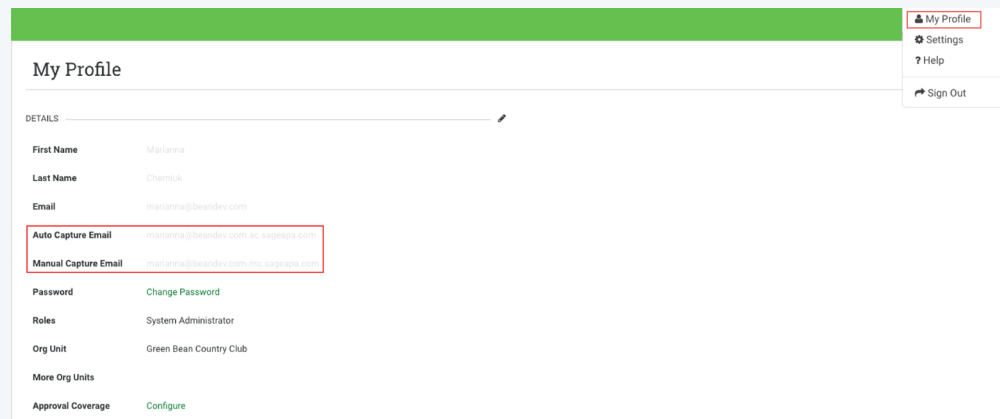
Invoices sent to the manual capture email address are listed in the **Create tab** of BeanworksAP. From here, users can create invoices and complete the header details as well as the proprietary coding themselves (this process is explained in a subsequent training guide).



Where to Find Your Beanworks Emails

To find your BeanworksAP email addresses, once you are logged in, click on the setting (gears) icon in the upper right corner and choose “My Profile”.

System administrators can view all Beanworks user’s email addresses belonging to their organization. In the user management area of the settings open the user detail screen by clicking on the pencil next to any user’s name. Your emails are assigned by the system and cannot be changed.



Accepted File Formats

You can email or scan in invoices in the following formats: PDF, JPEG, PNG, GIF or TIFF.

Make sure that your file can be read (minimum resolution of 72 dpi). PDF is the most recommended format.

Online File For Each Invoice

Invoices sent to auto capture email addresses **must be sent in as a single file** for each invoice. If you are emailing/uploading files into BeanworksAP which contain multiple invoices, you will need to use the document splitting tools within our software to separate each invoice.

Document splitting tools are located on the Create tab where recently emailed/uploaded invoices will be listed. This must be done immediately after emailing/uploading to ensure the auto capture is completed properly.

The detailed instructions for document splitting can be found in the user guide ‘Managing New Invoices in the Create Tab’.



Forwarding in Already Deligitized Invoices

The best way to get invoices into BeanworksAP, is to have your vendor's start sending you electronic invoices. If your vendor emails an electronic invoice to you, simply forward it to the BeanworksAP email of your choice. You can set up an autoforward rule on most email applications to do this automatically. Ensure when you forward an email that attachments are included. Work with your suppliers to ensure they are sending you invoices in our accepted file formats (PDF, GIF, JPEG etc.) and are sending **one invoice per file** (multiple files can be in one email).

Two Types of Invoices to Scan

When you are scanning invoices that arrive in paper format, we recommend separating your invoices into the following two groups:

- 8.5 x 11 single page, single side invoices
- Multi page invoices, double sided and invoices that are oddly shaped

Invoices that are 8.5 x 11, Single Page, Single Slide

Check to ensure your scanner/copier has a feature to turn a stack of pages into one PDF per page scanned. Most scanners less than 5 years old have this functionality. Once you have verified the above setting is selected, load all single page, single side invoices into the feeder tray of the scanner / copier. Ensure the scanner / copier is set to email the scanned invoices to the desired Beanworks user by using the specific user Beanworks email address as recipient. Now as you scan single page invoices through the feeder tray, each invoice will come into Beanworks as a separate PDF.

If you are not sure where to find this setting on your scanner, consult the person responsible for managing your scanner/copier to find where the feature is located. If you combine multiple invoices into one file by mistake you can use the document splitting tool right away under the Create tab.



Checking on Invoices from the previous day

Especially important when you first start using BeanworksAP, please ensure you verify the invoices sent in the previous day have all arrived in BeanworksAP properly. Since this is a new process it is necessary to double check and ensure your process is working and is as simple as possible for everyone. Keep any scanned invoices until the next day when you can verify they all arrived in the way you need them.

If you are not getting the expected result make sure you review the previous steps. If you forward invoices as emails, check your sent emails. Make sure your scanner or email recipient is configured to the right email address. Confirmed the file format is accepted and that invoices were separated in individual files.



Save Time, Cut Costs & Reduce Risk With AP Automation

Beanworks empowers your accounting team to work smarter by eliminating data entry and manual processes that cost time and money. Our centralized AP workflows help you strengthen controls, making your organization less vulnerable to fraud and errors.

Questions? Contact us

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