



AI Invoice OCR

User Guide

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1.Introduction

This document contains the steps to use **AI Invoice OCR**. AI Invoice OCR is an AI-enhanced solution that leverages **email integration**, **OCR (Optical Character Recognition)**, **AI-based data extraction**, and **ERP system connectivity** to automate invoice processing from end to end.

The solution captures invoice attachments directly from incoming emails and uses **document AI models** to extract critical fields such as vendor, invoice number, PO reference, quantities, and totals. It then performs **automated PO matching** by connecting to the ERP system and comparing extracted data against existing records.

Discrepancy detection mechanisms automatically flag mismatches in real time, enabling user to address issues swiftly and accurately. By seamlessly integrating AI-driven data extraction, workflow automation, and ERP system APIs, the solution transforms fragmented invoice processing into a streamlined, intelligent workflow—significantly reducing manual effort, enhancing data accuracy, and accelerating the overall financial operations.

2.Process Flow

2.1. Upload or send an email

Invoice ingestion:

- It can be done using direct upload.

The screenshot shows a Power Apps interface for 'New Invoices'. The top bar indicates 'Power Apps | AI Invoice OCR' and 'SANDBOX'. The form has a title bar with 'New Invoices - Saved' and 'Invoices'. Below the title bar are tabs: 'General', 'InvoiceData', 'ItemsNotFound', and 'Related'. The 'General' tab is selected. The form contains the following fields:

- InvoiceName**: A text input field with a placeholder '---'.
- Owner**: A dropdown menu showing 'Nitya Vijayvargiya (Available)' with a search icon.
- InvoiceDate**: A text input field with a placeholder '---'.
- Status**: A dropdown menu with a placeholder '---'.
- Document**: A text input field showing 'Demo_Invoice2_106046_1.pdf' and a 'Delete' button.
- Modified By**: A dropdown menu showing 'Nitya Vijayvargiya (Available)'.

A 'Form assist' button is located on the right side of the form.

- You can also upload by sending mail using any subject filter.

Invoice

Nitya Vijayvargiya
To: Nitya Vijayvargiya

testInvoice.pdf
48 KB

hiii

Thanks and regards,
Nitya Vijayvargiya | Intern
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Reply Forward

2.2. After invoice is uploaded

Power Apps | AI Invoice OCR | SANDBOX

Show Chart New Delete Refresh Visualize this view Email a Link Flow Share

Active Invoices Edit columns Edit filters Filter by keyword

InvoiceName ↑	InvoiceDate ↓	Status ↓	Document ↓
☐ Demo_Invoice2_106046_1.pdf	04/06/2025	Success	
☐ INVOICE_1488222 (4).pdf	14/08/2025	Success	
☐ INVOICE_1493539 (1).pdf	25/08/2025	Success	
☐ Invoice1_GRNMatch.pdf	04/06/2025	Success	
☐ PO106003.pdf	25/03/2025	Success	
☐ PO106052.pdf	11/03/2025	Success	
☐ PO106057.pdf	03/03/2025	Waiting for Extraction	
☐ PO152510.pdf	13/03/2025	Success	

Rows: 13

After the invoice is uploaded, the document is sent to AI to extract information, while extraction it shows “Waiting for extraction” and after the extraction is completed, its status is updated to ‘Success’.

2.3. Invoice data is extracted

Power Apps | AI Invoice OCR | **SANDBOX**

← Save Save & Close + New Deactivate Delete Refresh Check Access Assign Share

BL23995.pdf - Saved
Invoices

General InvoiceData ItemsNotFound Related

Form assist

InvoiceName: BL23995.pdf

Owner: * Nitya Vijayvargiya (Available) ×

InvoiceDate: 12/03/2025

Status: Success

Document: BL23995.pdf Delete

Modified By: Nitya Vijayvargiya (Available)

The extracted data is filled with invoice data on the dashboard.

Power Apps | AI Invoice OCR | **SANDBOX**

← Save Save & Close + New Deactivate Delete Refresh Check Access Assign Share

BL23995.pdf - Saved
Invoices

General InvoiceData ItemsNotFound Related

Form assist

+ New InvoiceData

☐	InvoiceName ↑	PONumber	InvoiceNumber	VendorName	InvoiceDate	InvoiceAmount
☐	BL23995.pdf	152423	8533	Affinity Material S...	12/03/2025	1,391.94

Rows: 1

The rest of the basic information is stored in InvoiceData where field like PO Number, shipping name, shipping address etc is stored.

Power Apps | AI Invoice OCR | **SANDBOX**

106059.pdf - Saved
InvoiceData

General InvoiceItemDetails ApprovedInvoice Related

Form assist

	InvoiceName ↑	Description	Quantity	UnitPrice	Total
☐	106059.pdf	HP 101 Mouse	100	255	25500
☐	106059.pdf	HP 102 Powercable	100	100	10000
☐	106059.pdf	HP 103 Screen	5	5	25

Rows: 3

The item list is stored inside the InvoiceData in the tab of the InvoiceItemDetails.

Power Apps | AI Invoice OCR | **SANDBOX**

106059.pdf - Saved
Invoices

General InvoiceData ItemsNotFound Related

Form assist

	Description ↑	ItemsNotfound	Founded	Difference	PONumber
☐	HP 101 Mouse	106059.pdf	Found incorrect...	Quantity in invo...	106059
☐	HP 102 Powercable	106059.pdf	Not found		106059
☐	HP 103 Screen	106059.pdf	Not found		106059

Rows: 3

If items are not found in the PO item details table, it will be shown in the ItemsNotFound tab.

The screenshot shows the 'Sandbox' environment in Power Apps. The top bar indicates 'Power Apps | AI Invoice OCR'. The main area displays the '106059.pdf' record in the 'ApprovedInvoice' tab. The record details are as follows:

InvoiceName	InvoiceDate	InvoiceDueDate	InvoiceAmount	BillingAddress	PONumber
106059.pdf	10/06/2025		\$41,919.50	XYZ MIA extentio...	106059

Rows: 1

If that invoice is approved, it is available in ApprovedInvoice tab.

The screenshot shows the 'Sandbox' environment in Power Apps. The main area displays a list of 'Active Approved Invoices'. The list contains the following data:

InvoiceName	InvoiceDate	InvoiceDueDate	InvoiceAmount	BillingAddress	PONumber	Shipp
106059.pdf	10/06/2025		\$41,919.50	XYZ MIA extentio...	106059	
4004.pdf	13/03/2025	12/06/2025	108.36	CARETAKER INC *...	106003	HAYD
BL24004.pdf	13/03/2025	06/12/2025	108.36	CARETAKER INC *...	152510	HAYD
PO106003.pdf	25/03/2025	12/06/2025	108.36	CARETAKER INC *...	106003	HAYD
PO106057.pdf	03/03/2025	02/04/2025	\$348.50		106057	Carete
PO152510.pdf	03/13/25	06/12/25	108.36	741 N MONTEREY...	152510	E RIO

Rows: 6

There is also a dashboard for all the approved invoices with their data extracted from invoices.

The PO table and PO item tables are already made in the ERP system. From there, a comparison is made.