Business Central Quickstart Guide

Now integrated with Microsoft Business Central

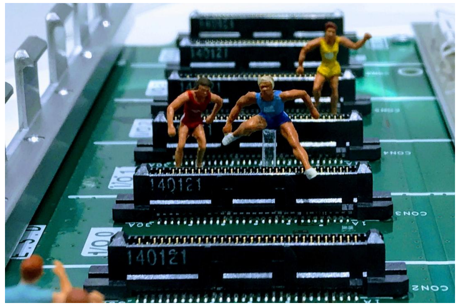
Procys gives you the power of a 100% self-learning invoice recognition technology. Manually processing your invoice data is a thing of the past. This quickstart guide aims to help you get started in setting Procys OCR Service up successfully within Business Central Online*

* Business Central On-Prem not supported

PROCYS

The benefits of using Procys through Business Central

Our technology helps you be quicker, more efficient and more accurate in processing your invoices.



Quick

Our ML technology can process an invoice up to 6x faster than people including bulk volumes.

Accurate

Our high extraction rates means less time is spent on data errors for shorter invoice processing times.

Better every day

Our self teaching engine learns from every invoice you give feedback on, getting more efficient and smarter with every use.

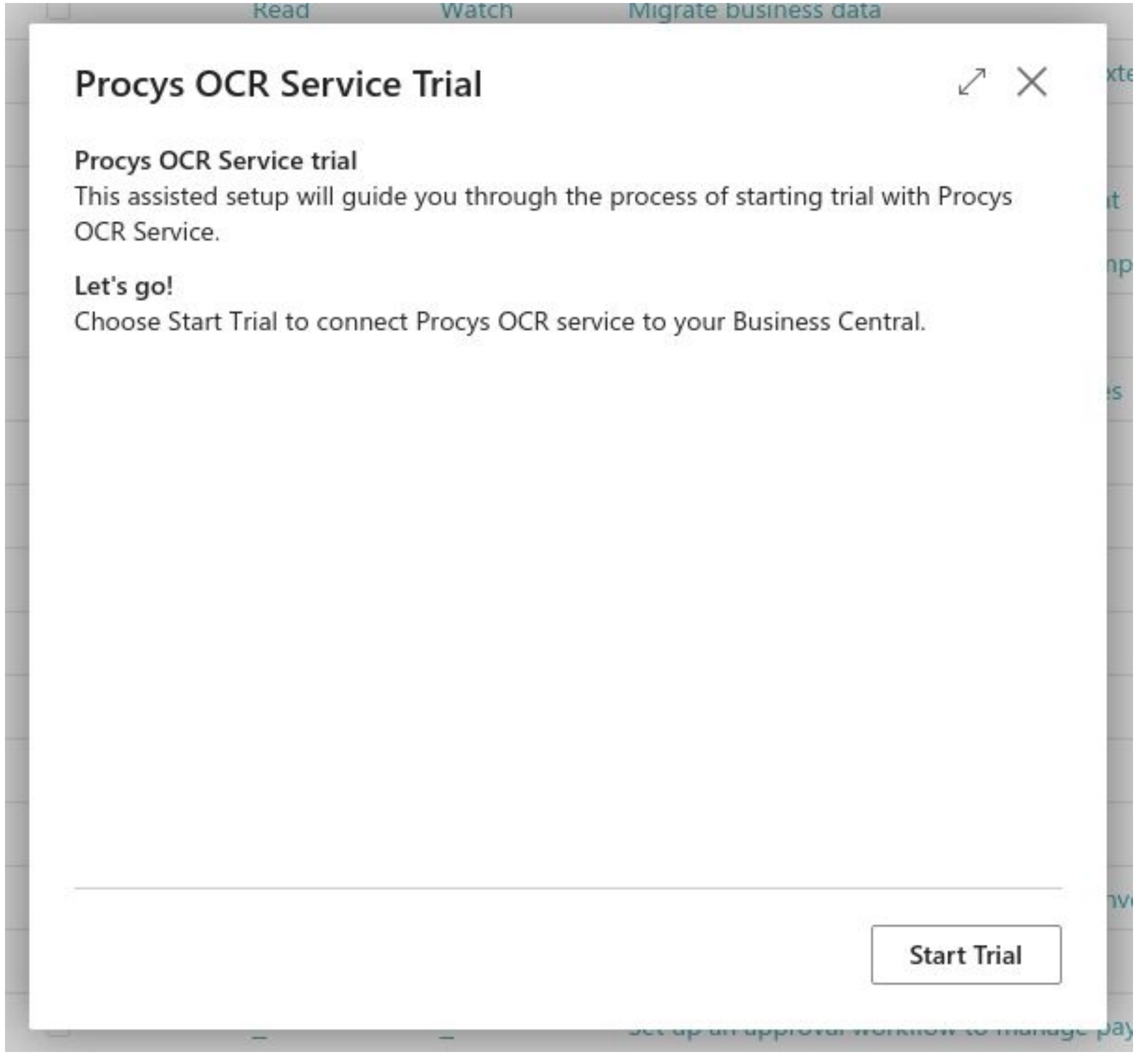
Start trial

Once you have downloaded and installed Procys OCR Service via AppSource, you need to activate the trial version by clicking Start Trial button. You can get to this button either:

i) from the notification in the Role Center, or

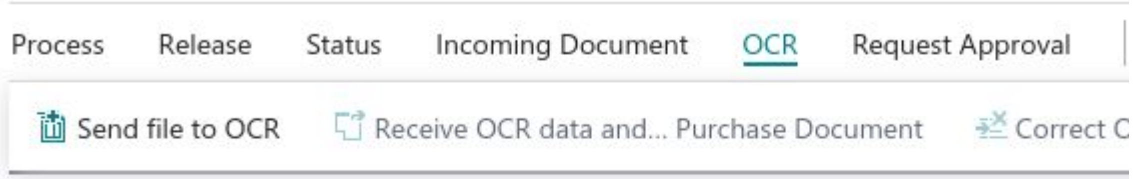
ii) from Setup & Extensions - Assisted Setup

With Trial Started, a user is created on Procys backend server and its credentials stored in your BC environment. In this setting, you are able to upload PDF/picture documents for processing and receive extracted data back to BC



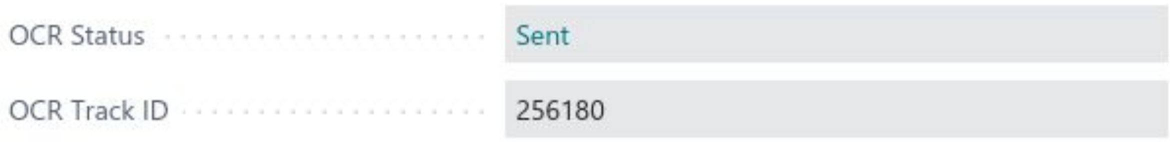
Send file to OCR

Procys OCR Service can process files in PDF, PNG, JPEG, or TIFF formats. From an Incoming Document card, go to OCR - Send file to OCR.



If the button is not enabled, check that the Incoming Document contains the right attachment. If the button is not in the ribbon, you did not start trial with Procys.

Once sent, OCR Status of the Incoming Document will change to Sent and OCR Track ID will be set to the reference ID of that document on Procys backend.



BVBA COMPANY-EXAMPLE NAME
Tel: +3197010281462
BTW: NL000000024B01
BIC: DABAIE2D
IBAN: NL91ABNA0417164300

INVOICE
134567

Bill To:
CRONUS NL
De Ring 5
Buitenveldert
Amsterdam 1111 DA

Ship To:
CRONUS NL

Date: Jun 29, 2021
Due Date: Jul 29, 2021
Balance Due: €2,311.10

Item	Quantity	Rate	Amount
Product1	5	€380.00	€1,900.00
Product2	1	€10.00	€10.00

Subtotal: €1,910.00
Tax (21%): €401.10
Total: €2,311.10

Receive OCR data

Once sent to OCR, Procys backend will put the uploaded document in queue for processing and process it as soon as possible. A rule of thumb is that most documents are processed within 30 seconds.

Go to Actions - Procys OCR - Receive OCR data to download XML file from Procys backend with extracted data and attach it to your Incoming Document. You can check the downloaded content by clicking on OCR Result field.

OCR Result	256181.xml

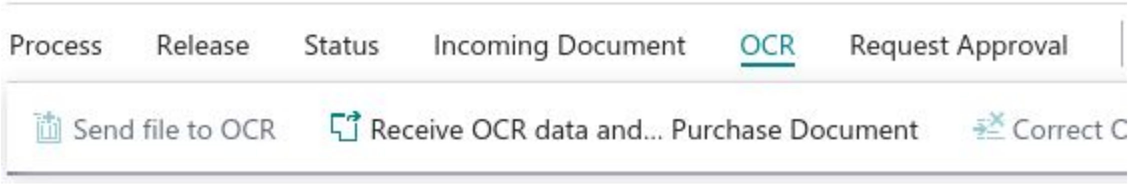
Upon successful downloading of XML file, BC will populate the Incoming Document's header fields. You will see the headers data under Financial Information tab. Lines data in the incoming XML is not shown here, but is employed when the document is transferred to the Purchase Document.

Financial Information

Vendor Name	BVBA COMPANY-EXAMPLE NAME	Vendor Order No.	
Vendor VAT Registration No.	NL000000024B01	Document Date	6/29/2021
Vendor IBAN	NL91ABNA0417164300	Due Date	7/29/2021
Vendor Bank Branch No.		Currency Code	EUR
Vendor Bank Account No.		Amount Excl. VAT	1,910.00
Vendor Phone No.	+3197010281462	Amount Incl. VAT	2,311.10
Vendor Invoice No.	134567	VAT Amount	401.10

Receive OCR data and create Purchase Document

For your convenience, we also added another button to the promoted ribbon of actions. Apart from receiving XML with the extracted data, this action attempts to automatically push the Incoming Document to a Purchase Document (Purchase Invoice or Credit Memo).



The created purchase document will contain invoice lines data from the received XML file. Each invoice line is either mapped to an Item via article number or to a General Ledger account via Map text-to-account feature. To get more information on how to setup the mappings, check the following links:

https://docs.microsoft.com/en-us/dynamics365/business-central/receivables-how-map-text-recurring-payments-accounts-auto-reconcilliation

https://docs.microsoft.com/en-us/dynamics365/business-central/inventory-how-use-item-cross-refs

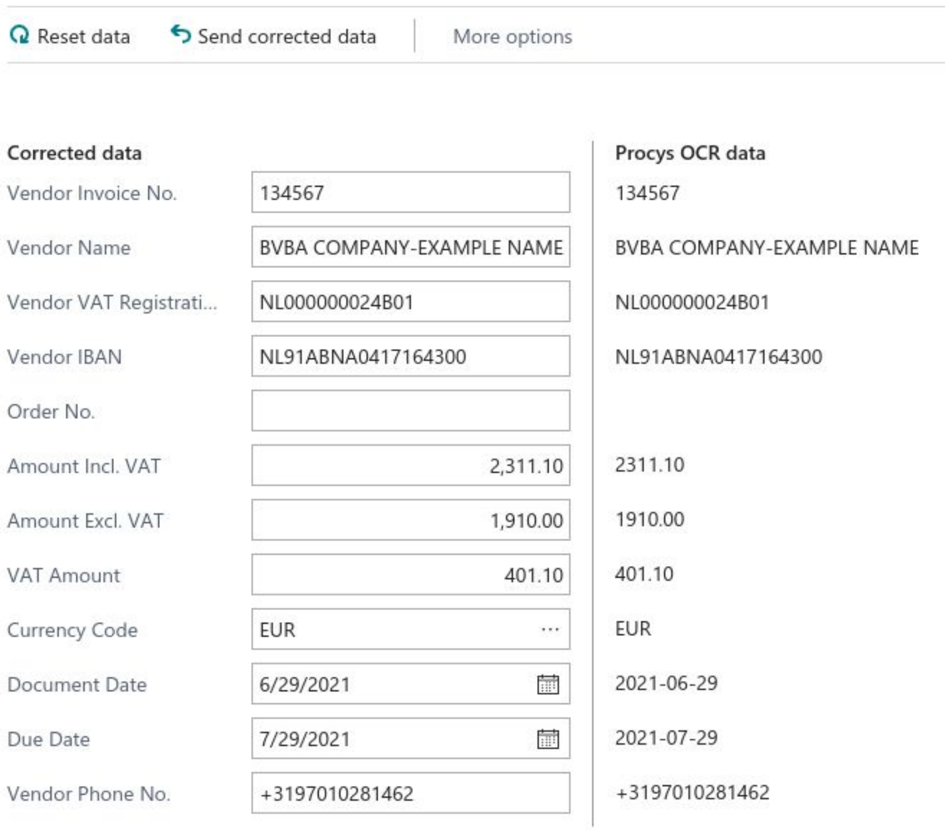
Send corrected data

Procys backend engine implements an ML-based approach under the hood. Extraction of headers and lines data from the original PDF or picture is managed via a self-learning algorithm that can improve its accuracy with your input.

You can provide input via correction action. In the opened window you will see two columns: *Corrected data* and *Procys OCR data*. The first column contains editable fields that you can interact with and set the values to the according header fields. The second column contains non-editable values that our engine predicted for these header fields.

Once supplied for learning, the data is submitted to our training set. Our algorithm retrains on the most current training set every day. The effect of correcting OCR data is seen after 24 hours.

Please note that proper training on some vendors is only achieved when corrected data of at least 3-4 invoices have been provided.


Reset data | Send corrected data | More options

	Corrected data	Procys OCR data
Vendor Invoice No.	134567	134567
Vendor Name	BVBA COMPANY-EXAMPLE NAME	BVBA COMPANY-EXAMPLE NAME
Vendor VAT Registrati...	NL000000024B01	NL000000024B01
Vendor IBAN	NL91ABNA0417164300	NL91ABNA0417164300
Order No.		
Amount Incl. VAT	2,311.10	2311.10
Amount Excl. VAT	1,910.00	1910.00
VAT Amount	401.10	401.10
Currency Code	EUR	EUR
Document Date	6/29/2021	2021-06-29
Due Date	7/29/2021	2021-07-29
Vendor Phone No.	+3197010281462	+3197010281462

Note : our algorithm can only learn on data that is ***explicitly present*** in the document. If the invoice number in the document is specified as "*Invoice number. 1*", the appropriate value is "*1*", not "*NO. 1*", or "Inv.1".

Vendors Data Synchronization

In BC, any Purchase Document must be attached to a single Vendor. Matching is accomplished via OCR extracted VAT number and it is performed on BC side. However, Procys backend is capable of more accurate matching via smarter comparison algorithm. You can take advantage of this enhanced algorithm by performing Vendors Data Synchronization action.

When triggered, the Vendors data from your BC environment is automatically synchronized with Procys backend and all extracted data will be validated against your Vendors.

Note : make sure you perform Vendors Data sync **every time** you edit or add a new Vendor in BC.

Support and Service

Our team is here to help answer your questions, you can always reach out to us at support@procys.com

1. General Support

Either assisted by our support team or your Microsoft consulting partner, we are here to answer your account, setup or service questions.

2. Technical Delivery

Reach out to our technical team to assist with any connection issues, delivery or data extraction requirements.

3. Service & Billing

For queries on processing volumes, reporting or billing, directly contact us and we will try to help you find the right answer you need..

4. Microsoft Support

For Business Central issues, please use Microsoft support tools or contact your Microsoft Consulting Partner.