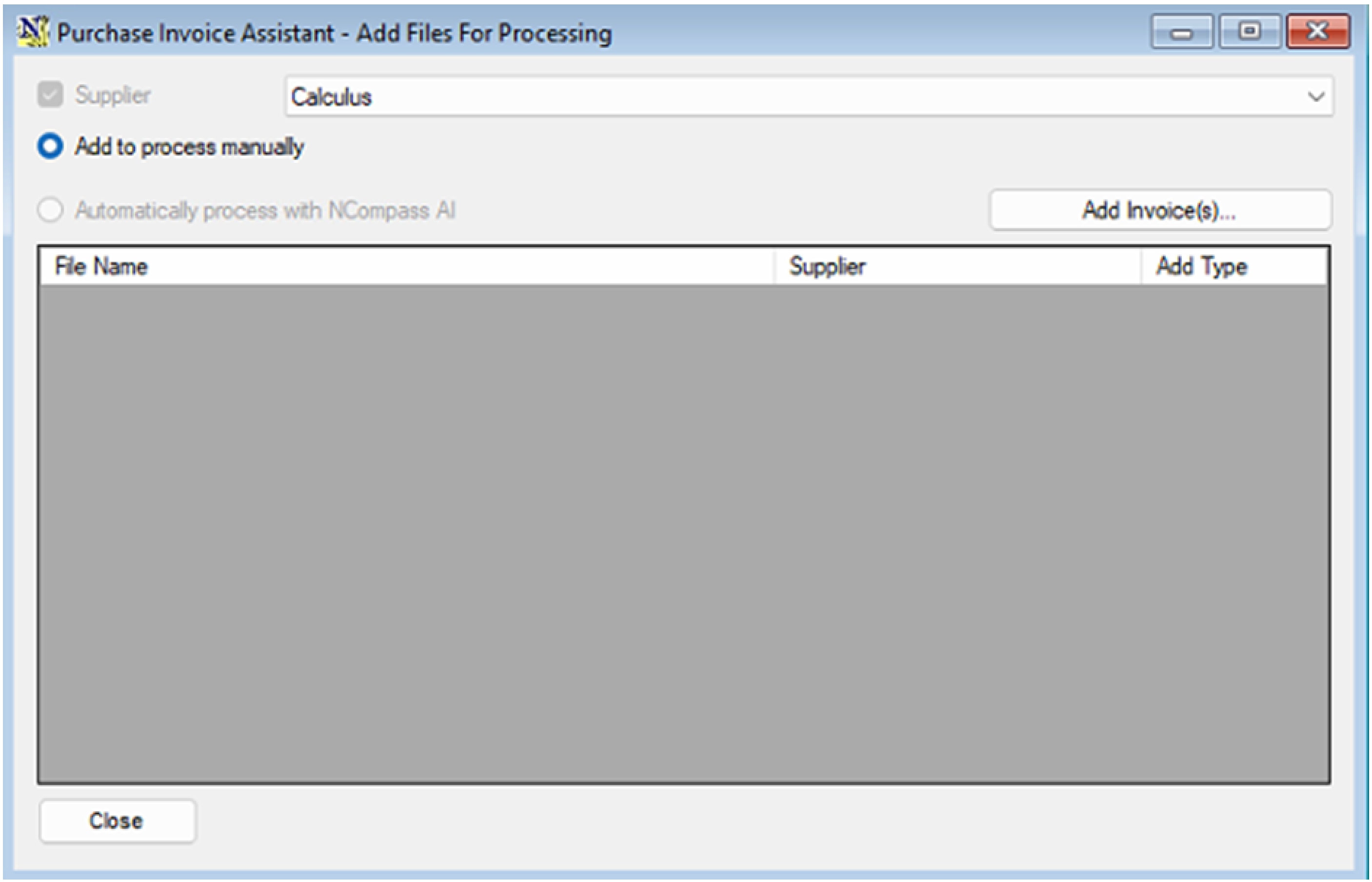
Processing Supplier Invoice Files

The **Invoice Assistant** allows you to upload supplier invoice PDFs into NCompass and process them into purchase invoices. This can simplify invoice entry and retain the original invoice document for future reference.

Adding Invoice Files

To upload invoices ready for processing:

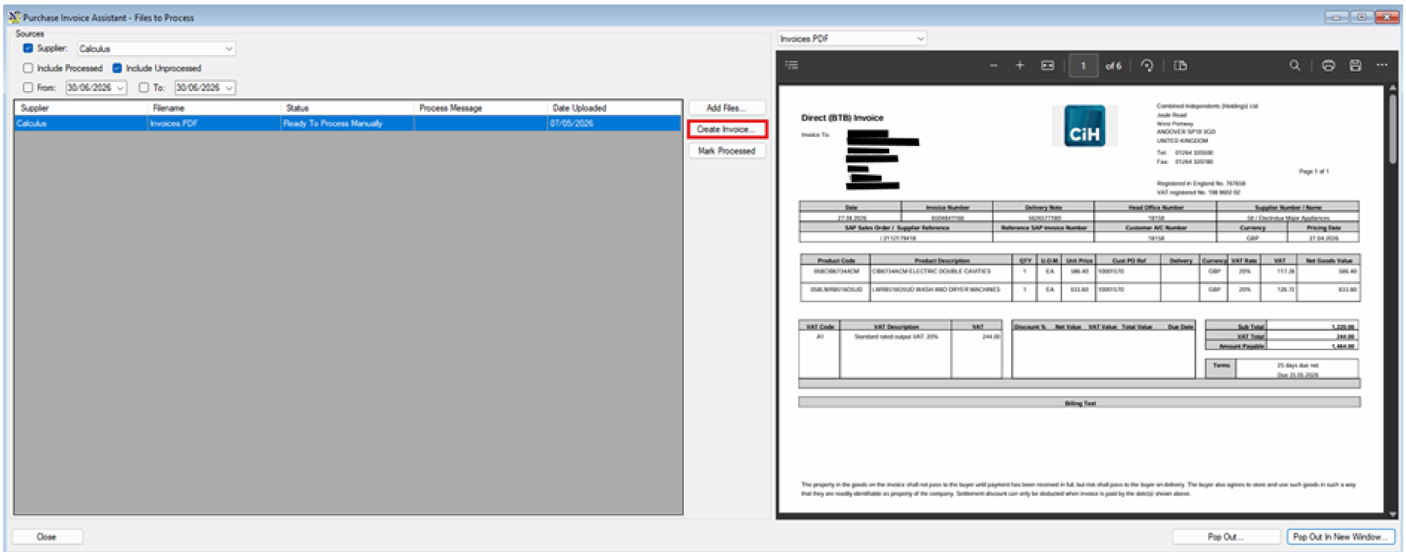
1. Navigate to **Products** → **Purchase Invoicing** → **Invoice Assistant** → **Add Invoices to Process**.
2. Select the **Supplier** from the drop-down list.
3. Add your invoice files using one of the following methods:
    - Click **Add Invoices** and browse to the invoice files.
    - Drag and drop the invoice files directly into the window.
4. Once uploaded, the invoices will be stored in NCompass and made available for processing.



Processing Uploaded Invoices

To process the uploaded invoice files:

1. Navigate to **Products** → **Purchase Invoicing** → **Invoice Assistant** → **Process Invoice Files**.
2. A list of all uploaded invoices awaiting processing will be displayed.
3. (Optional) Choose how you want to view the invoice document:
   - **Pop Out Section** – Displays the invoice in a separate panel.
   - **New Window** – Opens the invoice in a separate window, ideal if you have a second monitor.
4. Select the invoice you want to process.
5. Click **Create Invoice**.
6. Complete the purchase invoice as you normally would within NCompass.



Viewing the Invoice While Processing

Opening the invoice in a separate window can make data entry much easier, particularly when using two monitors.

Recommended setup:

- **Monitor 1:** Purchase Invoice entry screen
- **Monitor 2:** Supplier Purchase Invoice popped out in new window.

This allows you to reference the supplier's invoice while entering the details into NCompass.

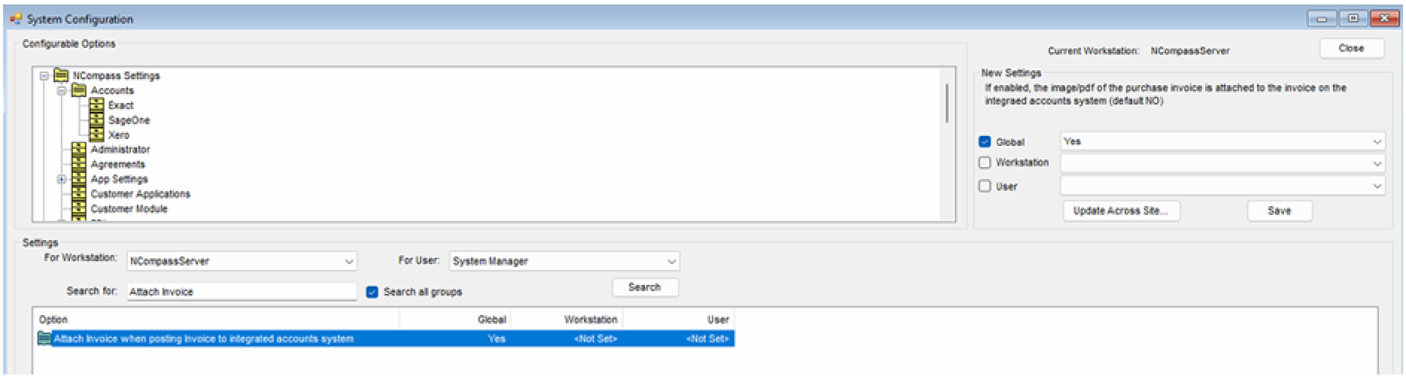
Exporting Invoice Attachments

If you export purchase invoices to your accounts package using the **NCompass API integration**, the original supplier invoice PDF can also be exported and attached to the purchase invoice.

This is supported when exporting to:

- Xero
- Sage

This allows users within the accounts package to view the original supplier invoice directly from the purchase invoice record. The following config needs to be set.



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