



Invoice Upload

efish provides you with multiple options for handling invoices including, EDI, a direct email account (AP Email Import established at set-up), Fax, & Scan/Upload. Designed for you to get your invoices in the system any way you prefer.

EDI (electronic Data Interchange): The simplest way to get your invoices in the system is by allowing us to set up EDI, which are rules on how we will exchange information with your vendors, this will bring in those vendors invoices automatically for you. efish will integrate with any of your suppliers capable of executing EDI.

AP Email Import: another easy way to get your invoices in the system is by setting up an AP Import Email Account, this is a dedicated email address which you can provide to any of your suppliers enabling them to simply email any invoice to you and it will be sent directly into efish.

To set up this email account follow these quick steps:

1. Navigate to **[Administration > Location Settings > General Tab]**
2. In the “AP Import Email” field enter what you wish your email address to be for this account. The format should be as follows: **blank@yourefishurl.biz** (fill in the blank with anything you wish but the rest must be consistent. For Example, if my efish URL was www.pb.efish.biz then my AP Import Email could be any of the following:
 - *Invoices@pb.efish.biz*
 - *pb@pb.efish.biz*
 - *Whateveryouwish@pb.efish.biz*

AP Import Email	<input type="text" value="pb@pb.efish.biz"/>
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3. Scroll down to the bottom of the page and click **[Submit Changes]**

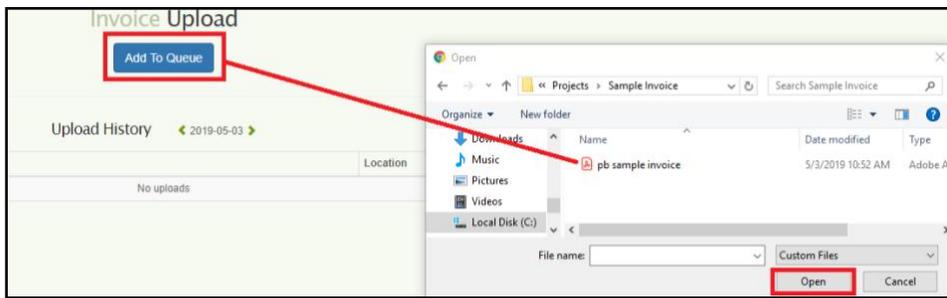
Now your Invoices will be automatically pulled into the system anytime they come through that email address.

Fax: You may receive invoice via fax as well, just make sure that your existing fax number is set up under **[Administration > Location Settings > General Tab]** (Fax, requires set up by Point Blank Software, Please notify Point Blank if you plan on setting up Fax options in order to set up, may require additional cost.)

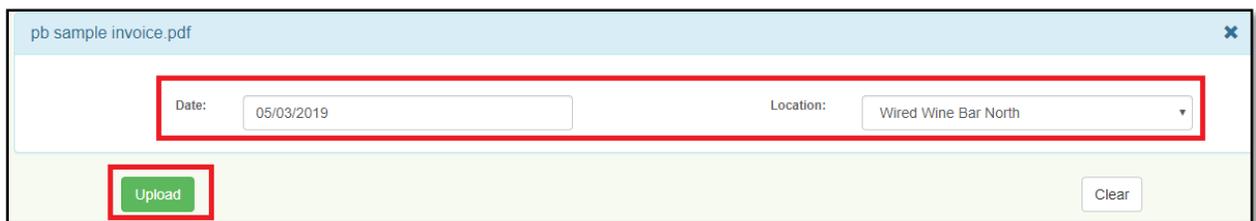
Fax Number	<input type="text"/>
AP Import Email	<input type="text"/>

Scan/Upload: You can also Scan and Upload any invoice(s) into the system directly. To do this follow these quick steps:

1. Scan the invoice(s) into your computer and save the file(s) anywhere you wish (locally, Dropbox, Google Drive etc.) (remember where it is saved)
2. In efish Navigate to **[Accounting > Invoice Upload]** this page will show you your upload history including Log ID #, Description, and Location. (you can click the **green [Arrows]** around the date to change the date you see.) **Note:** If you have access to multiple accounts make sure you have the correct location selected.
3. To upload an invoice, click on the blue **[Add to Queue]** Button. This will launch the window where you will need to find/select the file(s) you saved in step 1, then click **[Open]**.



4. Enter the Date by clicking in the **[Date Field]** and choosing the date from the calendar, select the Location from the **[Location Drop-Down]**, click the **green [Upload]** button and wait for the upload to complete.



5. Verify the upload went through - make sure there is a **Log ID #** in the left column of the Upload History section to the left of the invoice discription that matches the file(s) you uploaded. This number verifies that the invoice(s) was succesfully uploaded into efish.

Upload History < 2019-05-03 >		
Log Id #	Description	Location
5738	pb sample invoice.pdf 1 Page(s), 2019-05-03 Uploaded: 2019-05-03 12:14:52	Wired Wine Bar North



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Note: Uploading 20 or more invoices at a time may take 3-5 min before they populate in AP Processing.

Your all done uploading your Invoice(s) and they are now available in the system and automatically loaded into the corresponding AP Processing Stage! To locate invoices after you upload them, see the “**Invoice Lookup**” how to which is located in your document repository **[Operations > Document Repository > Efish Training and Support]**