

COMPLEAT



Capture External

for eCompleat





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**Empowering businesses to
achieve the extraordinary.**

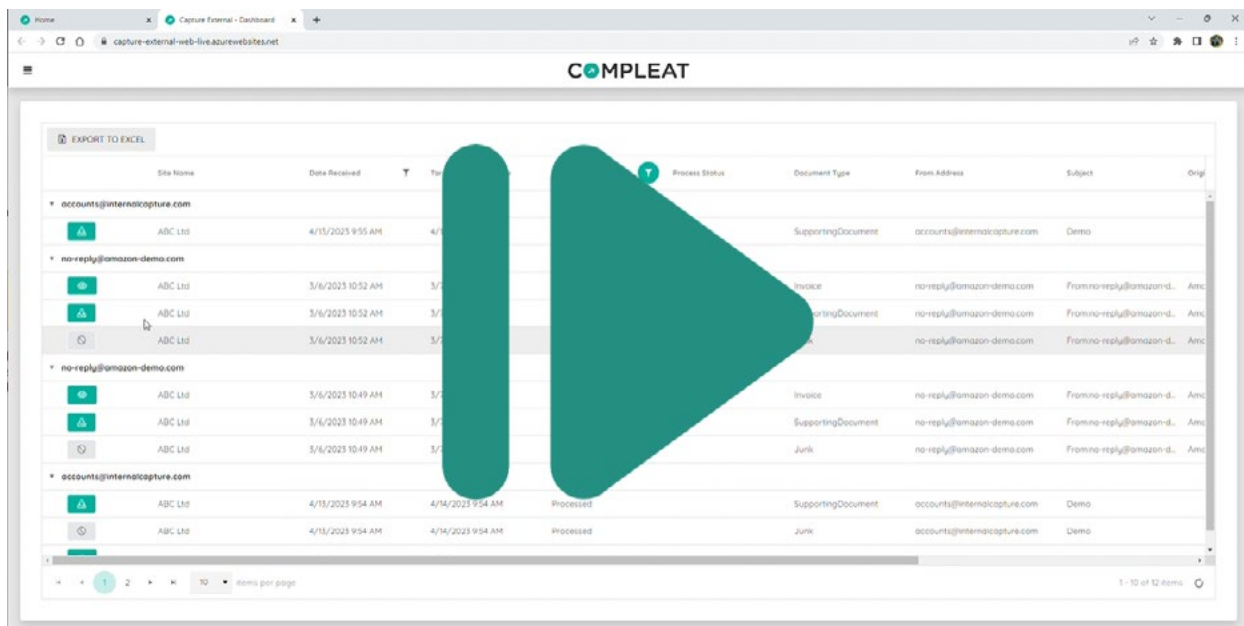


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What is Capture External?

This facility allows you to view and track both in flight and processed invoices from arrival into our Capture extraction utility through to fully processed and ready for automation into eCompleat. You have the option to filter against transactions including current status, processing time and even access a copy of the invoice and associated supporting documents.

Here's a video showing the tool and how it can be used:



What is its purpose?

We listened to our customers when asking for a way to track and monitor the arrival of invoices sent by their suppliers. The purpose of the solution is to ensure that you have live sight of transactions at any stage of AP process, as well as being able to handle questions as part of supplier management on-demand to validate that you have successfully received the invoice in questions.

What users require this?

This feature is most useful for Accounts Payable and Finance staff but can be granted access to anyone who's role is based around invoice processing or supplier management and capped to a maximum of 5 users.

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How do I access it?

To be given rights to the application, simply contact a member of our team via the support ticketing system, inform us you wish to utilise the solution and provide the full names and email addresses of the individuals who require access. Once activated, you will be informed this is ready to go (usually within 7 days of request) via email where you can set a password to access the solution.

Once the user has been given access to Capture External, they simply navigate to the following address:

<https://portal.compleat.online/login/capture-external>

Once loaded, simply enter your username and password to authenticate and the Capture External UI will then load.

What options does Capture External provide?

Capture External provides users with an element of filtering to help you access invoices quickly and easily, it also provides the user with the ability of viewing Invoice PDF's and also downloading any invoices or supporting documents locally.

To filter transactions, the options you can find include: filtering by processing status of the transaction, by date we received the transaction and file name in the event you are looking for a specific invoice file.

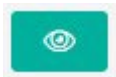
The aid your navigation, here is a list of the processing statuses:

- **Processing** - The document is flowing through our capture system where the solution is reviewing the document for automatic processing and any supplier on-boarding.
- **Question** - The document may require some extra validation for automation accuracy for example this is a new supplier where our AI cannot locate a certain required field.
- **Processed** - The document has processed and is available within iCompleat.
- **Errored** - Our system has encountered an issue when processing the document and will be reviewed by our expert team.
- **Rejected** - The document could not be processed and has been rejected to the sender, with a justification as to why this could not be processed, an example includes "this is not a valid invoice".
- **Breaching SLA** - The document has been waiting to be processed longer than our standard SLA guidelines and will be being prioritised for processing.
- **Breaching SLA Next Day** - The document may breach SLA within the next day.

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Viewing an invoice document

Should you wish to view any documents that you have found in Capture External, look out for this eye symbol against your transaction:



Downloading an invoice or supporting document

Should you wish to download any invoice, supporting document, or originating email body, simply hit the download icon in either the main summary grid or the invoice page which looks like this:



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Useful Links

Help Center - Information on help guides, tutorials and our what's new section keeping you informed and updated on your product changes.

<https://support.compleatsoftware.com/hc/en-us>

Support

Contact us by submitting a support case at <https://ecompleat.zendesk.com/>

OR

For any urgent query that requires immediate discussion, call one of our expert advisors on 0845 017 8090.



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