Supplemental Information Templates

## Creating a template page for supplemental invoice information:

Vendors can sometimes include additional pages with their invoices containing needed invoice detail and/or supporting documentation. The following steps will describe how to create template pages for invoice supplements and associating them with their primary template pages.
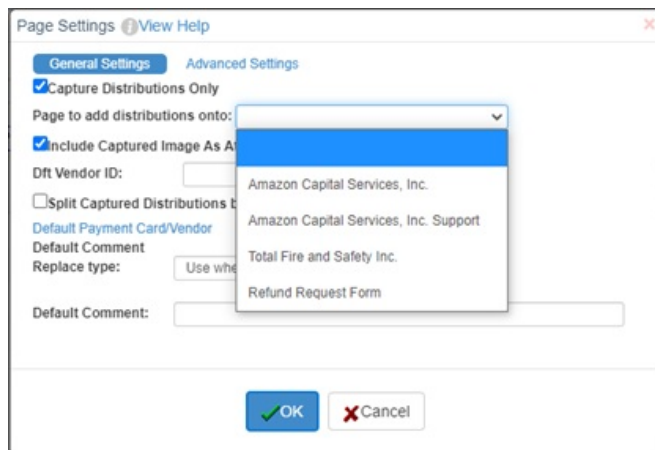
1. Follow steps 4-14 from "Adding Template Pages".

2. Click
   Settings

3. On the "General Settings" tab check the box for "Capture Distributions Only":
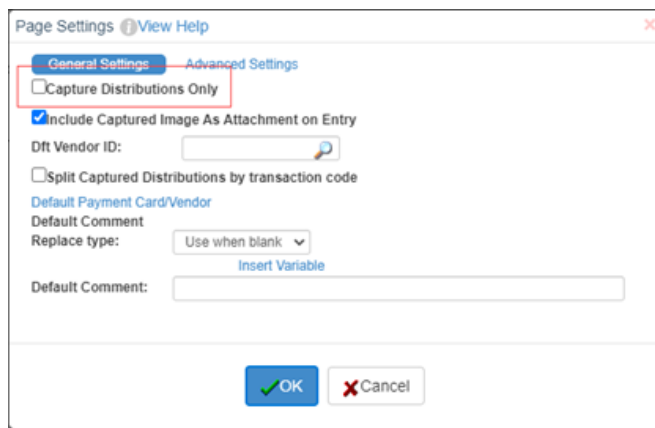
4. From the dropdown menu select the template page with which this supporting document should be associated:

5. Click "OK".

6. If any needed invoice information is present on the selected page add the necessary extraction boxes by following the steps listed above for "Adding Text Extraction Fields" and "Locating Information Using Adjacent Text (beside)" and/or "Locating Information Using Adjacent Text (below)".

7. Click "File", "Save".

8. Name the template page.

9. When presented with the "Page Selections" screen add page selections that will assist the system in identifying this page as being a supporting document. For example, review the document for the same page selections as the primary invoice template page and add an additional page selection to review for "page 2". Making the "Page Selections" unique will increase the probability of the system correctly identifying the document.

10. Click "OK".

11. When complete with all work click "Save" from the "Edit Digital Invoice Capture Template" page.

12. You are now finished and your document should be associated with its parent invoice when processed.