Vista Automatic Invoicing

Top Ten Frequently Asked Questions

Requirements & Setup

Do I have access to Automatic Invoicing?

Automatic Invoicing is fully integrated within Vista, but requires you to be a Trimble Construction One (formally Viewpoint One) cloud customer. We utilize cloud technologies to make Automatic Invoicing possible, and therefore this will not be made available to on-premise environments.

If you are not on the Trimble Construction One cloud, you can migrate while continuing to use Vista. We bring you to the cloud, enhance your Vista offering, and provide you a suite of integrated products. Ask your Account Representative for details on how Trimble Construction One can help you and your business!

How do I get started?

If you are on a supported Vista version and have an Office license, you can get started! No special equipment / scanners are needed, as artificial intelligence is built into the software.

In order to access Automatic Invoicing, users must:
- be using single sign-on in Vista. For details on enabling single sign-on, see instructions here.
- be given access by a Trimble Construction One Enterprise Admin. For details on editing user permission settings, see instructions here.

Automatic Invoicing can be accessed in 3 ways:
- Vista > Accounts Payable > Programs > AP Automatic Invoice Entry
- Vista > AP Unapproved Invoice Entry form > Automatic Invoice Entry button
- team.viewpoint.com > Main Menu > Accounts Payable

Tip: The Vista Automatic Invoicing Course in the Viewpoint Academy walks you through the Automatic Invoicing process, from start to finish.

Upload, Prepare & Process

What file types can I upload to Automatic Invoicing?

Automatic Invoicing accepts PDF files, but other file types can be converted to PDF. For example, a paper invoice scanned into a PDF will work just fine!

Can Automatic Invoicing monitor an AP mailbox (ex: company@AP.com) & import attached invoices?

Yes! With the inbox in Automatic Invoicing, you can have invoice-related attachments forwarded directly from your shared AP mailbox to Automatic Invoicing, where you can quickly add them to a batch to be processed. Step by step instructions for setting up the inbox can be found in the "Establish an Inbox" section of the Vista Automatic Invoicing Course in the Viewpoint Academy.

Users will determine which attachments to include in invoice batches - no need to worry about miscellaneous attachments getting pulled in. (They can also later remove extraneous pages if needed.) If there are multiple invoices in one email, each attachment is extracted as a separate item in the Automatic Invoicing inbox. This feature works like a forwarding email address, meaning the emails are just mirrored in the Automatic Invoicing feature - all emails that come to your designated AP email address can still be viewed / forwarded / replied to as they normally are in Outlook, Gmail, etc.

Regardless of how an invoice is uploaded into Automatic Invoicing (via the inbox or drag-and- drop), it goes through the same steps and ends with an AP Unapproved Invoice in Vista.

Does Automatic Invoicing detect duplicate invoices?

Yes! During the "Process" stage, an error symbol indicates if there is a duplicate invoice within a given batch - see more information here. If an invoice is flagged as a duplicate, check the invoice details to verify that the invoice is, in fact, a duplicate. If so, you can remove it by selecting the trash icon in the lower left-hand corner. If it is not a duplicate, correct the details accordingly.

Additionally, once clicking "Send to Vista", an error message will appear on the Completed tab if a duplicate invoice already exists in Vista. See more information here.

What fields does Automatic Invoicing populate? Will it read custom fields?

Automatic Invoicing currently populates the following fields: Vendor, Invoice Number, Invoice Date, Invoice Total, Month. It does not detect custom fields. We are actively working on adding additional fields - please use the suggestion box to submit and vote on ideas.

Does the vendor field pull vendors from Vista? Is the vendor address taken into account?

The artificial intelligence takes the vendor name from the PDF invoice, and matches it to a vendor name from the vendor list in Vista. The vendor name does not need to be exact for Automatic Invoicing to detect it. Automatic Invoicing also checks the address on the invoice against the primary vendor address in Vista, to auto-populate the vendor field more accurately. This means, even when there are multiple vendors with a similar or the same name, Automatic Invoicing can provide accurate results.

If the vendor is not in Vista or if the vendor is not accurately detected, the user will be able to search for a vendor. Or, if it's a new vendor, the user can create the new vendor in Vista, and then select it within Automatic Invoicing. When a new vendor is added or changed in Vista, it will appear in Automatic Invoicing.

How does the month field work?

The month field in Automatic Invoicing populates the month field in the AP Unapproved Invoice. The default is the month of the invoice date (for example: if the invoice is dated January, January will display) - but you can override as needed. Meaning, you will be able to choose the month before you send the invoice over to Vista. Of note, you can have different months in the same batch.

If the month is closed, the invoice will still flow to Vista as an AP Unapproved Invoice. Once in Vista, the normal invoice approval and posting rules apply.

Vista Approval Workflow

Does Automatic Invoicing change the approval workflow for invoices? How do I assign reviewers / reviewer groups?

After going through Automatic Invoicing, an invoice is imported into Vista as a new AP Unapproved Invoice. Once you are in Vista, you can assign reviewers / reviewer groups. If there are default reviewers assigned to a vendor, these will default automatically. Learn more about entering unapproved invoices (including assigning reviewer groups) here.

Tip: Additional background information on the AP Unapproved Invoice review / approval process can be found here.

Email notifications for invoice approval can be set up within Vista via Workflow Notifiers. Invoice approvals can also take place in Financial Controls. If using Financial Controls, approvers can choose to perform approvals via desktop or mobile devices.

Is the PDF invoice attached to the AP Unapproved Invoice in Vista?

Yes! After going through the Automatic Invoicing workflow, the PDF invoice is attached to the AP Unapproved Invoice header in Vista. In Vista, you can also attach supporting documents like delivery tickets, BOLs, lien waivers, or receipts.

Unanswered Questions?

Have an idea or want to vote on improvements that are important to you? Head to the Vista suggestion box - we would love to hear your feedback!

Visit us at **Viewpoint.com**, call **+1.800.333.3197**,
or email **productinfo@viewpoint.com** to learn more or schedule a demo.