

Vroozi AP Invoice Automation

This guide provides a comprehensive overview of streamlining invoicing processes and optimizing Accounts Payable workflows. Learn efficiently about various AP capabilities through real-world use cases, best practices, and the benefits of OCR capture + Vroozi Intelligence.

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AP AUTOMATION OVERVIEW

SHIFT TO AI AND AUTOMATION

The shift from manual Accounts Payable processes to AI-powered automation is primarily about empowering your AP teams by removing repetitive, administrative tasks. AI and automation abilities serve as a digital “helper” by scanning invoices and matching line items to streamline the purchase-to-pay (P2P) lifecycle.

VROOZI INTELLIGENCE

VROOZI INTELLIGENCE OVERVIEW

Smarter Invoice Handling

Vroozi can utilize AI to automatically read + capture an Invoice with our *intelligent scan and capture messaging*

- Allows for increased accuracy in comparison to standard OCR technology by pulling information/details from each line on the Invoice (Header, Footer and Line-Item information)

Automatic Invoice Coding

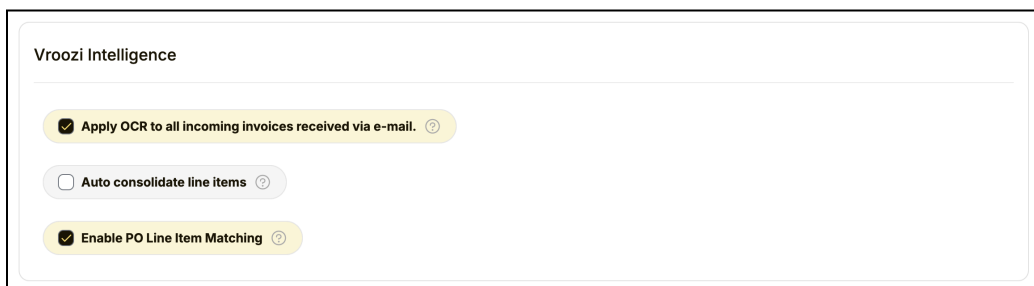
Vroozi Intelligence will automatically determine how to "code" each line item on the Invoice + include the level of confidence for proposed data values.

- Reduces time for manual invoice processing (particularly non-PO invoices)

Note: At the 'Create' Invoice level

Enablement

If your organization is subscribed to Vroozi Intelligence, it can be activated in the Administrator Panel under *Accounts Payable* → *Settings* → *Preferences*



Vroozi Intelligence

Apply OCR to all incoming invoices received via e-mail. ⓘ

Auto consolidate line items ⓘ

Enable PO Line Item Matching ⓘ

Admin Settings View

SCAN AND CAPTURE

Vrooz Intelligence uses **Cognitive Optical Character Recognition** to **Scan & Capture Invoices**

Smart Invoice Processing

Vrooz Intelligence will automatically scan incoming invoices for key details (line items, addresses, etc) and fill them into the system.

- Accuracy will improve with the more Invoices uploaded to the system

Confidence Score

The system will display a "confidence score" for all extracted data, allowing users to quickly reference when approving or editing information

- Confidence scores are color-coded based on confidence
 - **Blue** = strong confidence
 - **Orange** = moderate confidence
 - **Grey** = not confident enough OR the value may have been manually updated by the user

Uline 1-800-295-5510
 uline.com
 PO Box 88741 • Chicago, IL 60680-1741

INVOICE
 ULINE FED ID#: 36-3684738
 INVOICE #: 159221682
 ORDER #: 81872086

THANK YOU FOR YOUR ORDER. ULINE CUSTOMER SINCE 2002

SOLD TO: CAL MAINE FOODS CORP OFFICE SHIP TO: CAL MAINE FOODS
 STE 200 45105 DORMAN PL
 1052 HIGHLAND COLONY PKWY CALLAHAN FL 32011-3830
 RIDGELAND MS 39157

CUSTOMER NO.	PURCHASE ORDER NO.	SHIP VIA	ORDER DATE	DATE SHIPPED	TERMS	INVOICE DATE
20467876	2000126967	UPS GROUND	01/26/23	01/26/23	NET 30 DAYS	01/26/23

QTY ORDERED	UOM	UOM ORDERED	ITEM NUMBER	DESCRIPTION	UNIT PRICE	EXTENDED PRICE
1	EA		H-1197BE	RUBBERMAID® DOMED TRASH CAN - 25 GALLON, BEIGE 'T' DENOTES A TAXABLE LINE.		

Line Item #1 - Description
 RUBBERMAID® DOMED TRASH CAN - 25 GALLON, BEIGE
 'T' DENOTES A TAXABLE LINE.
 (93.00%)

ORDER PLACED BY: WOODY MEGDRE ACWRIGHT

SUB-TOTAL	280.00	SALES TAX	19.60	SHIPPING/HANDLING	28.78	AMOUNT DUE	\$328.38
-----------	--------	-----------	-------	-------------------	-------	------------	----------

Auto Populate Totals
 Subtotal: \$280.00
 Discount: \$0.00
 Calc. Discount: \$0.00
 Shipping Charges: \$28.78
 Tax: \$19.60
 Withholding Tax: \$0.00

SMART CODING

Vroozi Intelligence uses a machine learning algorithm that automatically predicts account coding values for Supplier Invoices during invoice processing. The goal of this feature is to reduce manual coding effort and improve invoice efficiency for Accounts Payable teams.

This functionality is specifically designed for:

- **Non-PO based OCR Invoices**
 - Supplier invoices received as PDF documents
 - Invoices processed through OCR extraction .

Intelligent Accounting Suggestions

Vroozi uses AI to automatically suggest *accounting codes* for each item on an invoice + confidence levels

- Easily select alternative codes if needed

Invoice processing is streamlined by intelligently removing unnecessary/duplicate line items (ie. zero-value entries, redundant tax lines, etc)

- Only view essential details needed for quick reconciliation

Continuous Learning & Setup

Once enabled and configured, the algorithm gets smarter and more accurate as more invoices are processed.

Summary

Key capabilities include:

- Automatic accounting prediction
- Threshold-based auto-application
- Field-level confidence control
- User override capability
- Customer-specific trained models

The feature helps reduce manual AP coding effort while maintaining user control and configurable confidence safeguards.

DUPLICATE INVOICE + MEMO CHECK

Documents (invoices or memos) under *Draft* status will be automatically checked for **duplicate** invoices.

If a potential duplicate is *attempted* to be created, Vroozzi will send an alert showing the matching documents.

This feature allows for the prevention of submitting multiple copies of the same invoice + checks for them in the **hopper** in real time.

	Sender	Subject	Supplier	Tags	Received On	
<input type="checkbox"/>	MJ Mike Jud mike.jud@vroozzi.com	Non PO invoice	KFORCE INC.	Kforce Invo...	02/23/2025	...
<input type="checkbox"/>	MJ Mike Jud mike.jud@vroozzi.com	PO invoice 2011	Furniture ABC	Mike Jud	02/23/2025	...
<input type="checkbox"/>	MJ Mike Jud mike.jud@vroozzi.com	Non PO Invoice	KFORCE INC.	Kforce Invo...	02/23/2025	...
<input type="checkbox"/>	MJ Mike Jud mike.jud@vroozzi.com	Non PO Invoice	KFORCE INC.	Kforce Invo...	02/23/2025	...
<input type="checkbox"/>	SK Sujoy Kar sujoy.kar@vroozzi.com	MN cXML invoice for PO 2000001995	Bristol Farms	John +1	12/02/2025	...
<input type="checkbox"/>	SK Sujoy Kar sujoy.kar@vroozzi.com	Test	Bristol Farms	John +3	10/06/2025	...

Hopper View

Invoice #	Created Date	Invoice Total	Status
9000001551	07/08/2025	\$120.00	Draft
9000001464	04/22/2025	\$120.00	Draft

PDF View

INVOICE-ORDER LINE MATCHING

Enable **Invoice-Order Line Matching** to allow the AI to verify individual line items on a Supplier's invoice corresponding to the items listed on the original PO document.

Rather than simply validating "header-level" total amounts, line-level matching compares quantity, unit price, item descriptions, etc for each row on the invoice.

Workflow: Vrooz Intelligence AI will look for items on the Invoice → Try to match the items to the corresponding PO → Instead of bringing items directly from the PO, it will bring the items from the PDF itself.

- AI Invoice-Order Line Matching is much more specific than standard OCR technology
- Description, quantity, price, tax, etc will be parsed directly from the PDF and accounting information will come from the PO

PO MATCHING

Purchase Order Matches for Invoices in the Hopper

Vrooz Intelligence helps quickly find + link Purchase Orders (POs) to invoices in the system (with or without PO # on the Invoice)

- Users can assign a PO from the action column → Invoice will then be created + matched to the selected PO

Note: This works for invoices in cXML

PO Lookup

Note: You are only able to reference applicable PO's in 'Submitted', 'Ordered', 'Confirmed', 'Partially Confirmed', 'Partially Disputed', 'Shipped' and 'Received' status.

Search by PO #, Requester and Supplier Name

PO #	PO Creation Date	PO Amount	Supplier	Request Name	Status	Action
2000002002	12/19/2025	\$848.00	Furniture ABC	Mike Jud 1000003373	Ordered	[Icon]
2000002001	12/19/2025	\$139.99	1-800-Flower	Mike Jud 1000003373	Reference PO to Invoice	[Icon]
2000002000	12/19/2025	\$599.00	Furniture ABC	Mike Jud 1000003372	Received	[Icon]
2000001999	12/19/2025	\$1,797.00	Furniture ABC	Mike Jud 1000003371	Received	[Icon]

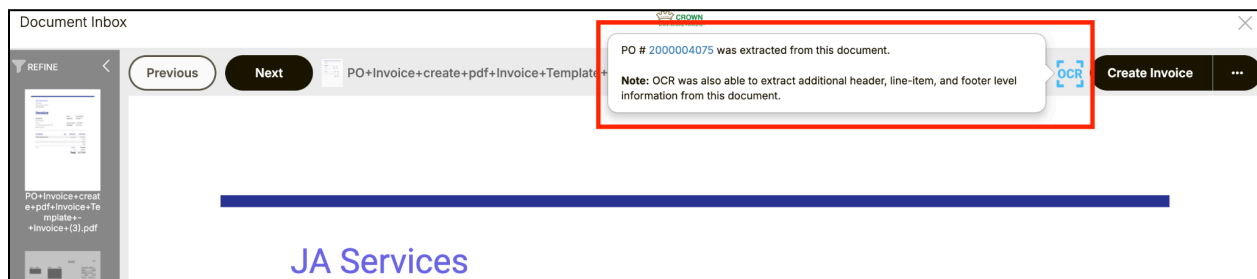
Action column

OPTICAL CHARACTER RECOGNITION (OCR INVOICE PROCESSING)

WHAT IS OCR?

OCR (Optical Character Recognition) technology permits the *reading* and *extraction* of content contained on an electronic document.

OCR is able to scrape content off of an image and/or from scanned and electronic PDF documents. Vroozzi supports the capability to apply OCR to your PO and non-PO based invoices.



OCR view from Invoice Document Inbox

OCR ADVANTAGES FOR PO-BASED INVOICES

A significant reduction in the time and effort (between 40% and 70%) required for your AP processors to manually index invoices within Vroozzi.

Vroozzi's OCR feature will be applicable for PO and non-PO based invoices received via email.

Hover over the OCR icon to view:

1. Parsed Value: Value/Field extracted
2. Confidence score (in percentage)

Confidence Score

The system will display a "confidence score" for all extracted data, allowing users to quickly reference when approving or editing information

- Confidence scores are color-coded based on confidence
 - **Blue** = strong confidence
 - **Orange** = moderate confidence
 - **Grey** = not confident enough OR the value may have been manually updated by the user

Invoice Overview

Enter the Supplier and Payment Information

Parsed value: **JA Services** | Confidence: **96.00%**

Company * 10001 - Corporate

Supplier * 1122 - JA Services

Supplier Invoice # * 46044131

Invoice Date * 01/22/2026

Payment Terms * Net 30

AI display of a 96% Confidence Score

OCR VALUES

Values/fields on a PO-based Invoice?

Fields are extracted by referencing the matching PO number and pulling the line details from the digitized PO.

- Supplier/Vendor Name
- Payment Terms
- Company Codes
- All Line-Item data (description, unit price, quantity, etc, are imported directly from the PO rather than being parsed from the invoice itself)

Values/fields on the Invoice from a non-PO Invoice?

Note: Accounting Information cannot be extracted from a PDF or PO document (i.e.; GL Account numbers, Cost Centers, accounting codes – must be coded manually by an AP Processor / handled outside the basic OCR text extraction layer)

Header & Footer Level Information:

- Supplier/Vendor Name
- Supplier Invoice number
- Invoice Date
- Payment Terms
- Billing / Shipping Addresses

Line-item Level Information (will be extracted directly from the PDF text)

- Line Item Descriptions
- Unit Prices
- Quantity
- Unit of Measure
- Tax on the Line Items

OCR REQUIREMENTS

The following requirements must be satisfied before OCR can be applied:

- Invoice must be less than or equal to 30 pages.
- Invoice must be less than or equal to 10 MB
- Supported file type: pdf, docx, doc, xlsx, xls, jpeg, jpg, tif, tiff, png, or bmp
 - **Note:** It does not matter what format the file is sent in → the Hopper will automatically convert incoming invoices into PDF format

CONFIGURATIONS AND AUTOMATION SETUP (ADMIN ROLE)

EMAIL ALIASES

Accounts Payable → Settings → Inbox

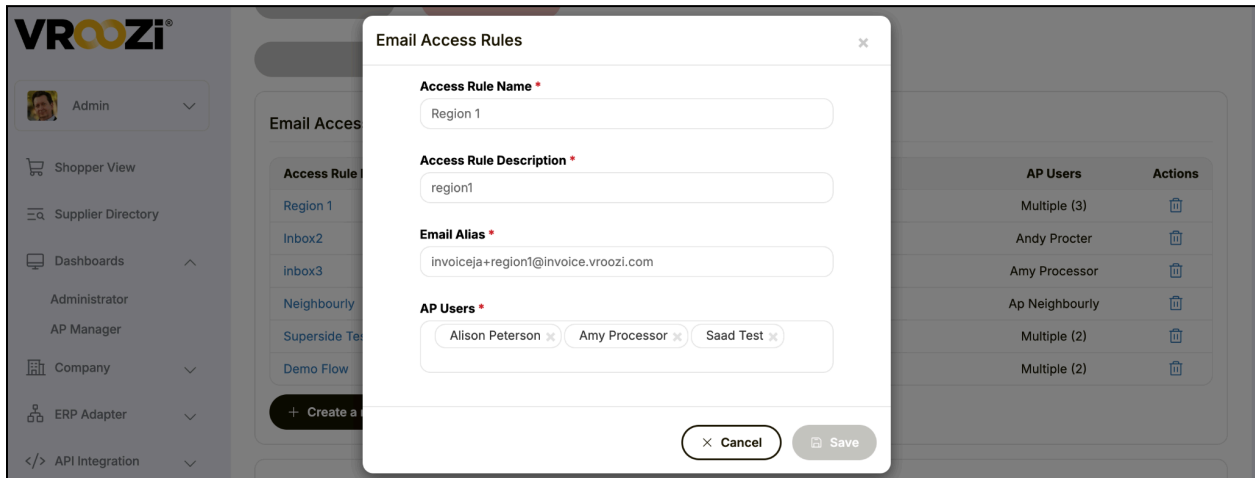
Email Aliases are individually created inboxes that streamline how supplier invoices enter the Accounts Payable workflow. Instead of sending invoices to a centralized inbox (which can get overcrowded), Suppliers or internal staff can simply send invoices directly to unique addresses (ex. invoicevroozi+inbox2@vroozi.com).

Purposes and Advantages

Centralized Intake: Provides the ability to create an organized funnel for incoming invoices, separating by role, region, company etc.

Controlled Access: Administrators can use “Email Access Rules” to define the AP Processors who have access to the specific invoices going into the designated inbox.

- Assign users under each alias at the “Email Access Rule” section



EXCEPTIONS

Accounts Payable → Settings → Exceptions

Exceptions are rules that determine when an invoice requires human intervention versus when the system has permission to automatically process it. Enabling these settings act as a “filter” that flags any data discrepancies that fall outside of your organization’s pre-defined rules.

Tolerances

Invoice tolerances are mismatch numerical or percentage thresholds you can set so that only invoices that breach these thresholds are subjected to Exception Handling. Tolerances are only applied when the value on the invoice exceeds the corresponding value on the PO

- **Example:** if a PO Subtotal is \$100 and the invoice Subtotal is \$110, but the Subtotal Tolerance is defined at 8% (of PO Subtotal), then this invoice will be required to undergo Exception Handling. If the invoice Subtotal was \$108 or fewer, the system would allow the invoice to be processed without requiring any manual intervention.

Exceptions
Disable Two-way Match ?

Tolerance Definitions

What are 'Invoice Tolerances'?
 Invoice Tolerances are mismatch thresholds that you can define so that only the invoices that breach these thresholds are subjected to Exception Handling. [Learn More](#)

<input checked="" type="checkbox"/> Product and Service Line Item 'Price' Tolerance ?	Unit Percentage ▾	Value ? 10%
<input checked="" type="checkbox"/> 'Subtotal' Tolerance ?	Unit Percentage ▾	Value ? 10%
<input checked="" type="checkbox"/> Product and Service Line Item 'Quantity' Tolerance ?	Unit Percentage ▾	Value ? 10%
<input checked="" type="checkbox"/> Total 'Quantity' Tolerance ?	Unit Percentage ▾	Value ? 10%

You can set tolerances for several categories:

- **Price:** Line item or subtotal differences
- **Quantity:** Discrepancies in the number of items received vs invoiced
- **Tax & Shipping:** Unexpected variations in government fees or freight costs
- And more...

In Practice: When an invoice is captured by the Vroozi AI, the system instantly compares it against your organization’s Exception settings.

1. **If it’s within tolerance:** The invoice can follow a “Straight-Through Processing” (STP) path, meaning the invoice will move to approval
2. **If it’s outside tolerance:** The field will be flagged and the invoice will be routed to the designated Exception Handler to resolve the mismatch

PREFERENCES & AUTOMATION TOGGLES

Accounts Payable → Settings → Preferences

This section of toggles define the level of manual vs autonomous (AI-powered) processing for your organization’s AP workflow. Administrators are able to control the level of automation / system behaviors that govern how invoices can move from capture to payment.

Invoice Coding Access

Preferences → Invoice Coding Access

Invoice Coding Access

Allow certain user roles with Coding access and Apply to All functionality during Exception Handling. ?

Purpose: Utilize this toggle to decentralize the dispute resolution process by extending accounting privileges (GL codes, cost centers, tax codes) to other roles in Vroozi (Requesters, Buyers, and AP Coders) for streamlined invoice processing/posting. This toggle eliminates the need to hunt down accounting details from internal departments and allows users to push systematic coding corrections across all line items of a large invoice with a single click ('Apply All' function').

cXML Invoicing & Straight-Through Processing

Preferences → Automatic Creation and Submission of AP Documents

Submit incoming PO based cXML AP documents for Exception Handling:

That only contain one or more Goods Receipt related exceptions ?

Note: Please select/modify the 'User Group / Type' that such AP documents should be submitted to, below.

That contain tolerance based exceptions ?

Note: Please select/modify the 'User Group / Type' that such AP documents should be submitted to, below.

Create and submit incoming invoices from Supplier Portal without exceptions, for approval ?

Create and submit incoming API AP documents without exceptions, for approval ?

Purpose: These toggles serve as the controls for your organization's STP (straight-through processing) workflow by defining the business rules for what makes an electronic invoice valid enough to advance towards payment automatically.

Toggle 1: Utilize this toggle to automatically route invoices to the AP team for resolution when the discrepancy is a timing delay (goods haven't been accounted for by the vendor → causing a Missing Goods Receipt)

Toggle 2: Utilize this toggle to automatically flag variances in unit price, subtotals, or over-shipped quantities and automatically route to Exception Handling for human review.

Toggles 3 & 4: Utilize these toggles to automatically create, submit and push the invoice to the appropriate approval chain if the invoice passes background validation with zero errors + exceptions (for Invoices from the Supplier Portal or APIs).

On the other hand, if an invoice contains structural or validation failures, the system will halt and re-route the invoice into 'Draft' status for manual intervention.

API Auto-Processing

Preferences → Automatic Creation and Submission of AP Documents

Submit incoming PO based API AP documents for Exception Handling:

That only contain one or more Goods Receipt related exceptions ?

Note: Please select/modify the 'User Group / Type' that such AP documents should be submitted to, below.

That contain tolerance based exceptions ?

Note: Please select/modify the 'User Group / Type' that such AP documents should be submitted to, below.

Purpose: These toggles act as an automated routing switch specifically for API-submitted invoices that fail validation.

Toggle 1: Utilize this toggle to handle the operational side when an invoice is transmitted via API before physical items have been validated by the Supplier. Targeted invoices are those where the data is accurate but has a Missing Goods Receipt → causing the matching process to fail. The invoice will be re-routed through Exception Handling workflow for resolution.

Toggle 2: Utilize this toggle as a financial shield against overbilling by automatically catching invoices that violate your organization's allowed budgets. Line-item price mismatches, unit or total quantity overages and sub/total calculations will be flagged for human resolution and prevents the API from auto-posting incorrect charges into the ERP.

OPERATIONAL NAVIGATION

AP WORKSPACE UPDATES & NAVIGATION

AP Users have a rebranded Accounts Payable Workspace that will serve as the default landing page for quick actions and task management. The user experience

modernizes a previous side-by-side Inbox to 2 separated tabs for Document Inbox & Tasks.

Accounts Payable Workspace

Resolve Exceptions: 1
Overdue Invoices: 38
Requires Coding: 0
Posted Today: 0

130 Document Inbox (Documents to process) | 3 Tasks (Pending actions)

Inbox (130) | Archive (21)

Search by Sender Name, Sender Email and Subject

Bulk Actions | Manage Tags

	Sender	Subject	Supplier	Tags	Received	
<input type="checkbox"/>	MJ Mike Jud mike.jud@vroozi.com	Non PO invoice	KFORCE INC.	Kforce Invo...	02/23/202	...
<input type="checkbox"/>	MJ Mike Jud mike.jud@vroozi.com	PO invoice 2011	Furniture ABC	Mike Jud	02/23/202	...
<input type="checkbox"/>	MJ Mike Jud mike.jud@vroozi.com	Non PO Invoice	KFORCE INC.	Kforce Invo...	02/23/202	...
<input type="checkbox"/>	MJ Mike Jud mike.jud@vroozi.com	Non PO Invoice	KFORCE INC.	Kforce Invo...	02/23/202	...

Customize Columns in AP Workspace

Users can customize the visible columns in their AP Workspace using the cogwheel icon in the header bar. The AP Workspace’s Document Inbox and Archived grids have columns that users can view, sort, and filter to improve visibility, triage and prioritize:

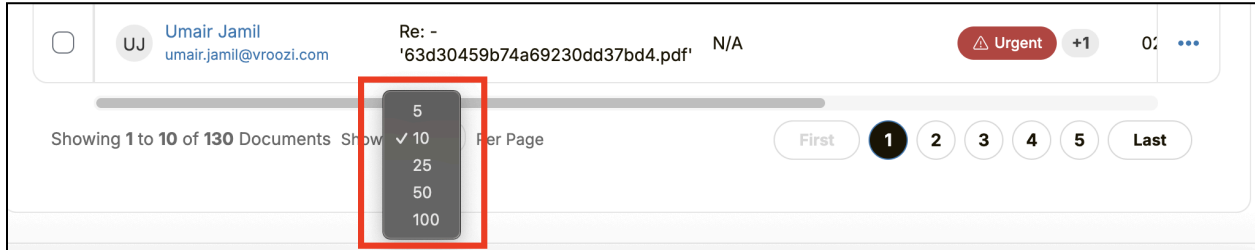
- Supplier
- Supplier Document #
- Tags
- Total
- Source (Email, cXML, API, and Supplier Portal)
- Age (with color-coded indicators)
 - 0-10 days: Green
 - 11-20 days: Orange
 - 21+ days: Red
- Comments

Advantages: Users can quickly assess key details without opening each document – This feature is available by default, but users will need to configure the columns they want to add to their AP Workspace.

Pagination & Page Size Controls

Enhance efficiency, especially when managing large datasets, by selecting 5, 10, 25, 50 or 100 (default is 10) documents per page on the AP Workspace Document Inbox, Archive or Tasks grid.

The selected page size is automatically saved across different tabs, navigation sessions and subsequent logins.



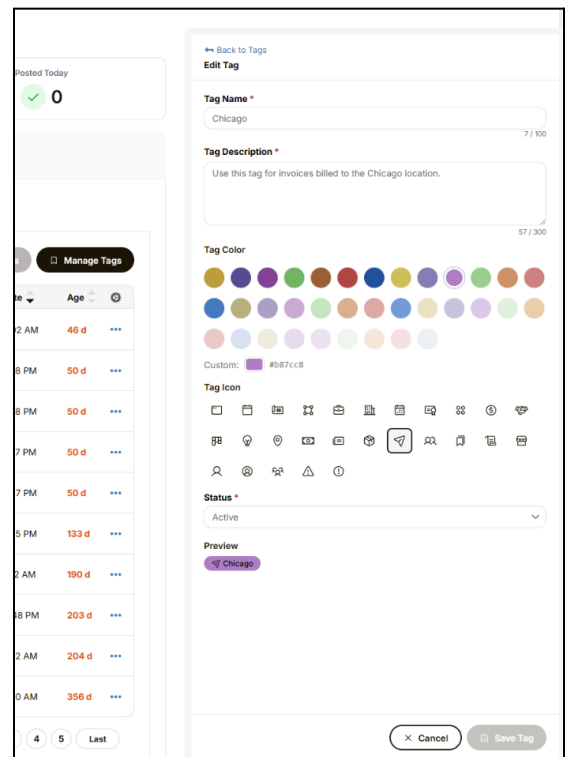
VROOZI TAG MANAGEMENT

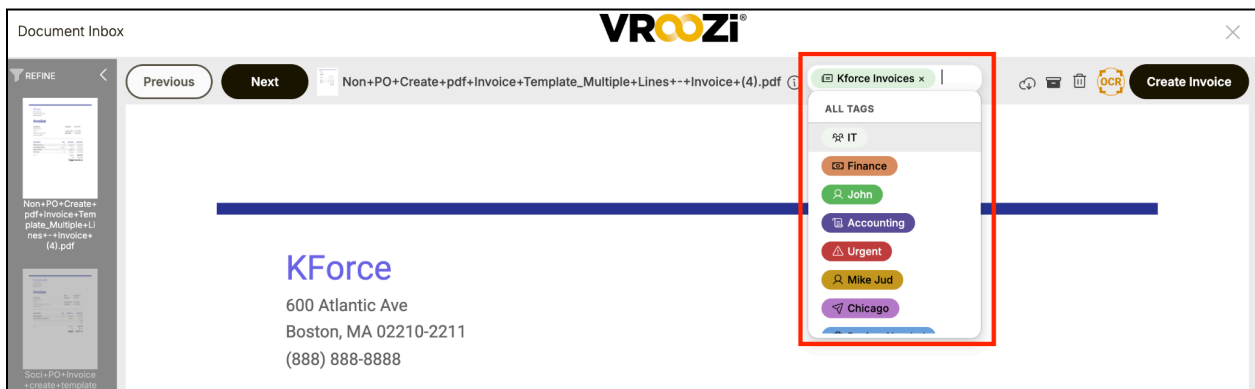
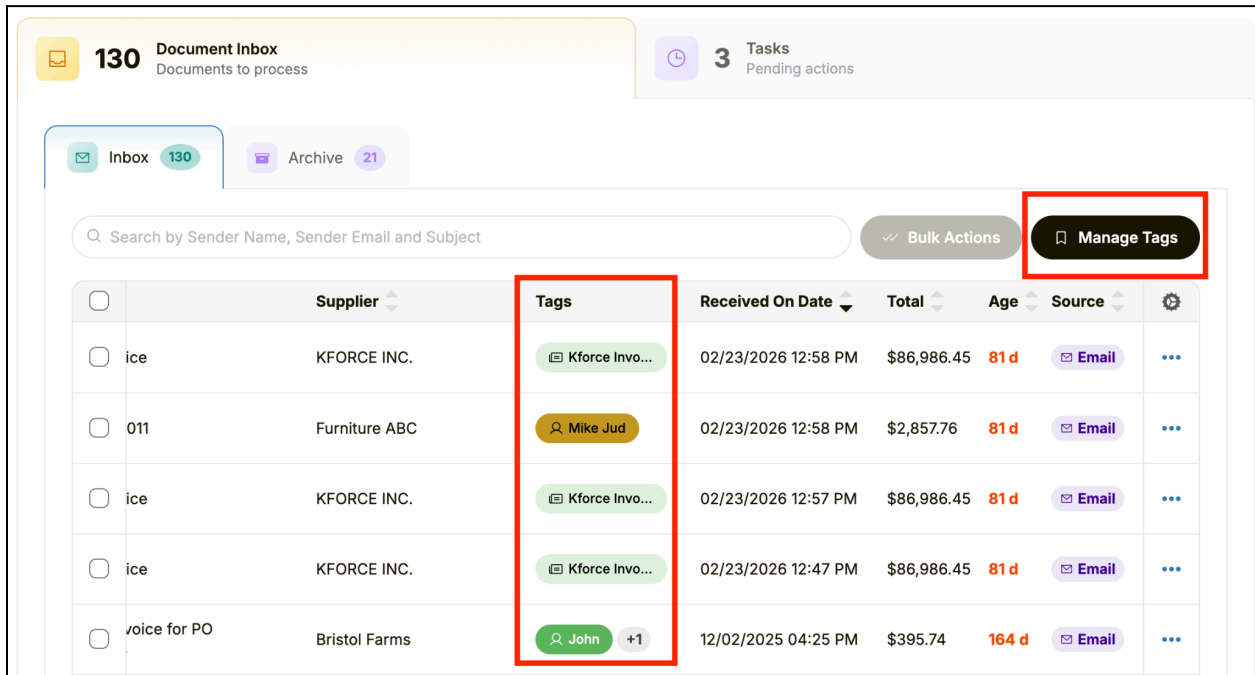
Tags allow AP users to manage their work lists and priorities for more efficient invoice document processing + organization. Tag creation is dependent on the role of the AP user (see below) and can be created to include a name, description, color, and optional icon.

Tags can be managed by the following roles:

- **Admins** can manage all tags
- **AP Managers** can manage tags created by other AP Managers or AP Processors
- **AP Processors** can manage the tags only they create

Active Tags are displayed to AP users in the AP Workspace Document Inbox and within the document PDF viewer.





Bulk Action for Tags

Bulk Actions in the Document Inbox (Inbox & Archived) allows users to multi-select documents on the current page and perform bulk actions including: assigning, replacing and removing Tags.

This feature is designed to improve productivity for AP teams who manage large document volumes and is available by default without further configuration. Bulk selection is limited to the current page + cannot be undone.

130 Document Inbox
Documents to process

3 Tasks
Pending actions

Inbox 130 **Archive 21**

Search by Sender Name, Sender Email and Subject

Bulk Actions **Manage Tags**

<input type="checkbox"/>	Sender	Subject	Supplier	
<input checked="" type="checkbox"/>	MJ Mike Jud mike.jud@vroozi.com	Non PO invoice	KFORCE INC.	...
<input checked="" type="checkbox"/>	MJ Mike Jud mike.jud@vroozi.com	PO invoice 2011	Furniture ABC	...
<input checked="" type="checkbox"/>	MJ Mike Jud mike.jud@vroozi.com	Non PO Invoice	KFORCE INC.	...
<input type="checkbox"/>	MJ Mike Jud mike.jud@vroozi.com	Non PO Invoice	KFORCE INC.	...

Update Tags for Selected Documents x

Choose how you would like to update tags for the selected documents.

4 documents selected

- Assign Tags
- Replace all tags
- Remove specific tags
- Remove all tags