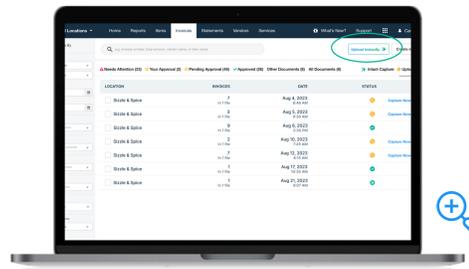
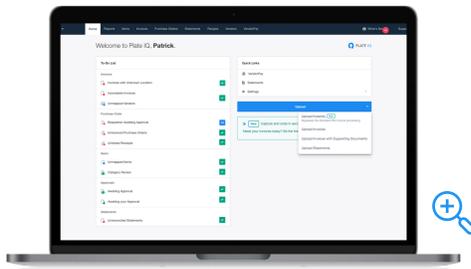


# Instant Capture

## How-To Guide

### Initiating Instant Capture From Plate IQ Home Screen and Invoice Screen

- 1 Choose **“Upload Instantly”** from the Upload section in the Invoices tab, or click the **“Upload Instantly”** button on the home screen.

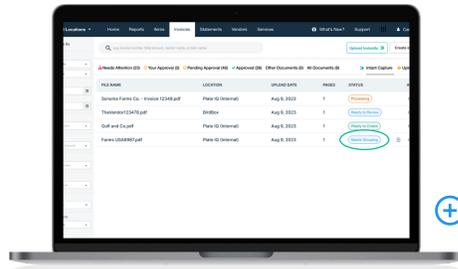


- 2 Drag and drop your invoice(s), or click **“Browse Files”** to search your computer for the invoice you’d like to upload.
- 3 Click **“Go to Uploads”** to visit your Instant Capture upload screen. The Instant Capture upload list can also be found next to the **“Uploads”** tab on the Invoice page.

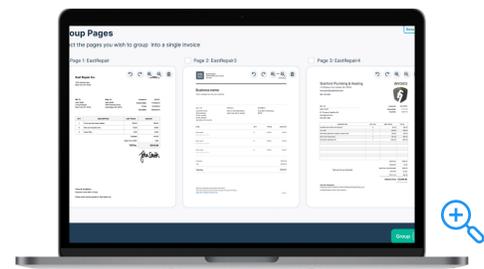
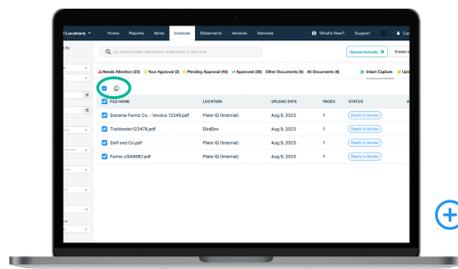


## Reviewing Your Instant Capture Upload

**4 Grouping Multi-Page Files:** Our page sorter will ask you via a series of Yes/No questions to determine which pages fit together on a single invoice.



**5 Grouping Single Pages:** Select the pages you wish to group from the list. In the bulk action section, click the group icon. In the grouping screen, select the pages you wish to group into a single invoice and click the “Group” button.



## Reviewing Your Invoice

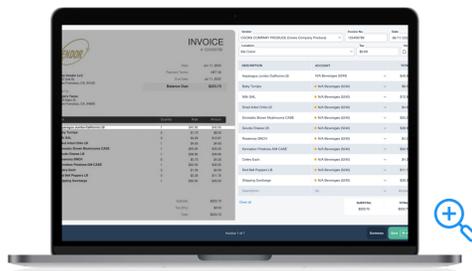
**6** You can navigate between three different view types:

- Header information view
- Account split view
- Line items view

**7** Instant Capture will capture and code your invoice, then you know the areas you need to review:

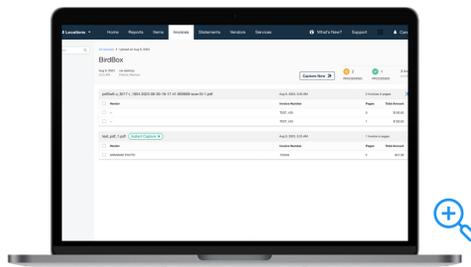
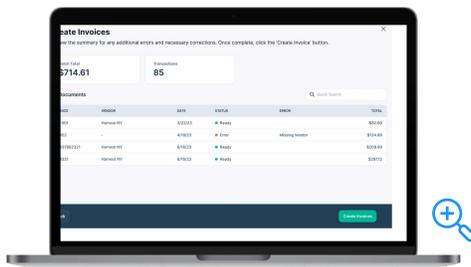
- **Red dots** indicate missing information. Instant Capture will automatically update relevant line items as you update missing information and will remember your coding for future invoices.
- **Yellow dots** indicate information that you should review for accuracy.

**8** Click “Save”.



**9** Review your Instant Capture **summary list** and address any additional errors if necessary.

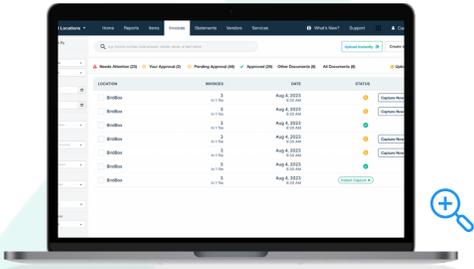
**10** Click “Create Invoices”. Upon creation, your upload screen will indicate the invoice that was processed via Instant Capture by adding a small badge next to the invoice file.



# Applying Instant Capture to Previously Uploaded Invoices

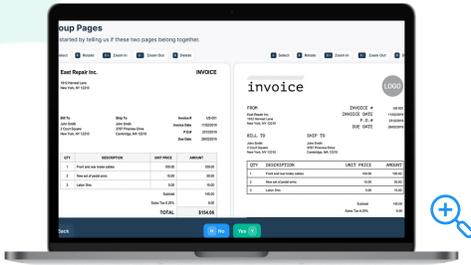
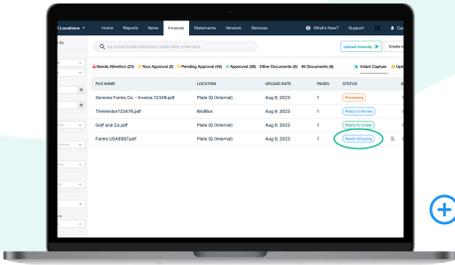
Invoices that were uploaded by other methods and are still being processed can be instantly captured with a click of a button.

1 Go to your **Invoice Upload** screen.



2 Click **“Capture Now”** next to the invoice you want to capture instantly.

3 If this file contains multiple invoices from a single PDF, our page sorter will ask you a series of **Yes/No** questions to determine which pages fit together on a single invoice.



4 Instant Capture will capture and code your invoice and let you know areas you need to review.

5 Click "Save".



6 Review your Instant Capture summary list and address any additional errors if necessary.

7 Click "Create Invoices". Upon creation, your upload screen will indicate the invoice that was processed through Instant Capture by adding a small badge next to the invoice file.

