Sisukord

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AUTOMATING E-INVOICE POSTING

In Directo, the processing of a received e-invoice can be automated fully (from creation to automatic confirmation) or in selected steps. The process consists of the following steps:

- 1. The e-invoice arrives in Document transport
- 2. The e-invoice is processed, i.e. a follow-up document is created
- 3. The follow-up document is enriched, i.e. the rows are supplemented with supplier automation
- 4. The purchase invoice goes through proceeding and is confirmed

Directo offers automation, i.e. less manual work, for each step. You can choose automation step by step or leave the entire process from start to finish to Directo. For example, purchase invoices can be created and posted automatically, while proceeding and confirmation require user action.

E-invoice arrival in Document transport

If receiving e-invoices has not yet been set up in your database, you can find **Directo's integrations with e-invoice operators** and detailed instructions for setting them up HERE....

In addition to integrations, e-invoices from which purchase invoices can be created can also reach Directo when **Directo AI creates an e-invoice from a PDF invoice**. This means that if you send a PDF invoice to your company's data.directo.ee mailbox, the system automatically creates an e-invoice from it, which can be processed like a regular e-invoice. You can find more instructions HERE.

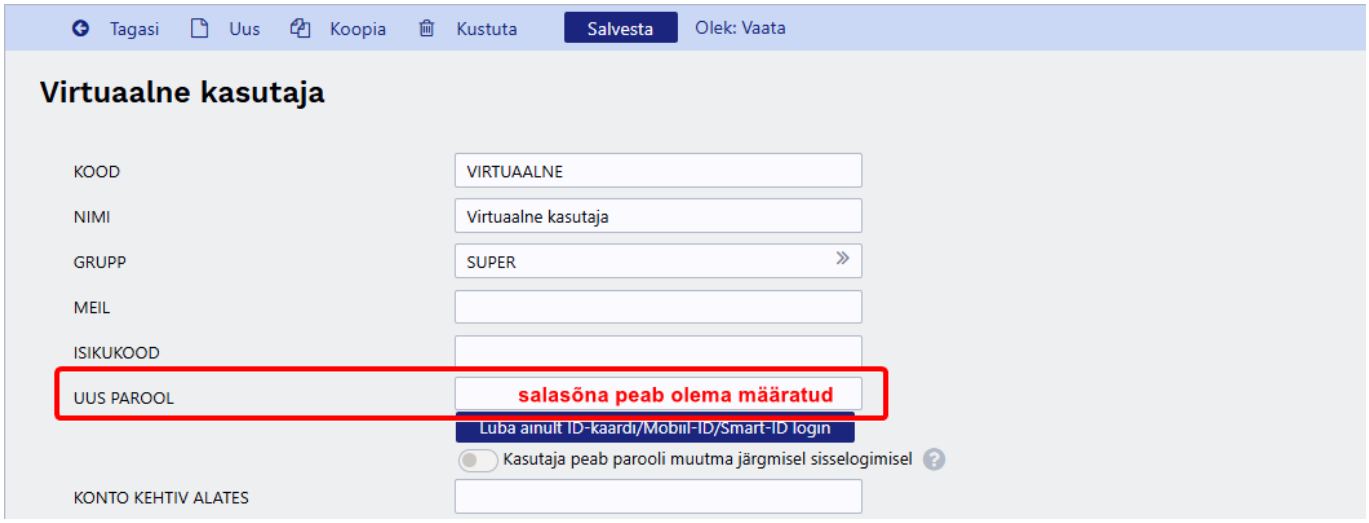
You can also create purchase invoices from **expense documents** (receipts, invoices, screenshots) that an employee has photographed with a mobile phone or uploaded from the gallery in **MyDirecto**. The documents are digitised with AI and submitted directly to Directo. Read more HERE.

Automatically creating a purchase invoice from an e-invoice

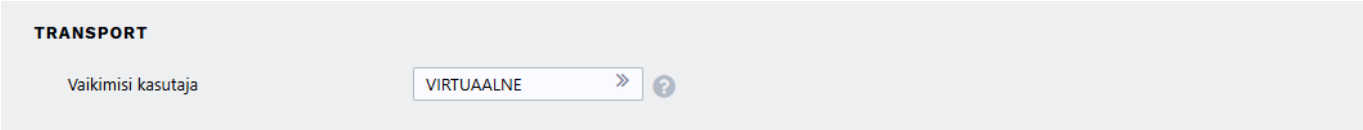
1. E-invoices received via e-invoice channels

If you want purchase invoices to be created automatically, a user under whom the document is created must be set for all e-invoice channels – Finbite, Telema, RIK, etc. This must be a real user with actually assigned rights.

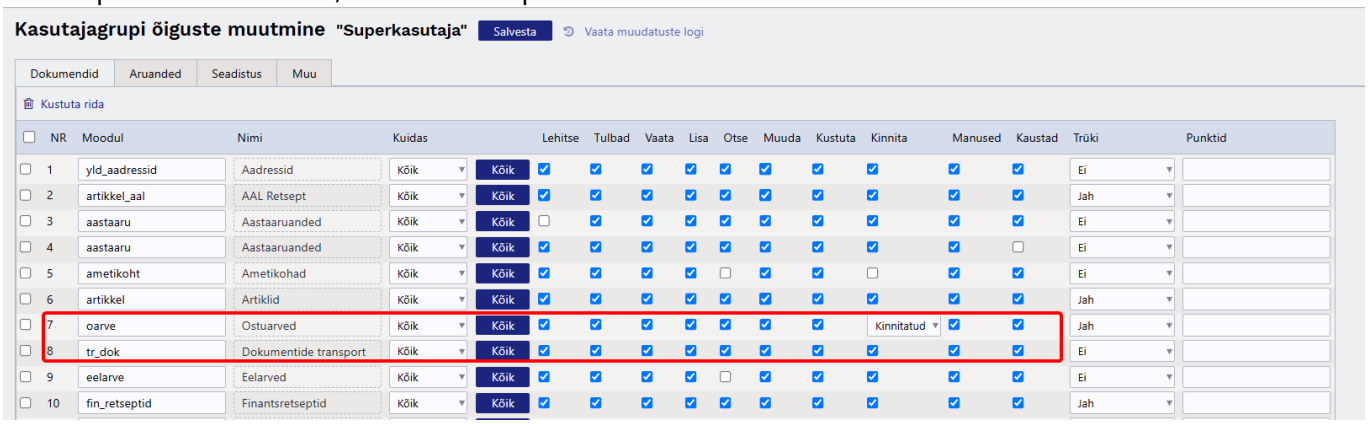
Create a **default, i.e. virtual, user** who can log in, i.e. who has a password set.



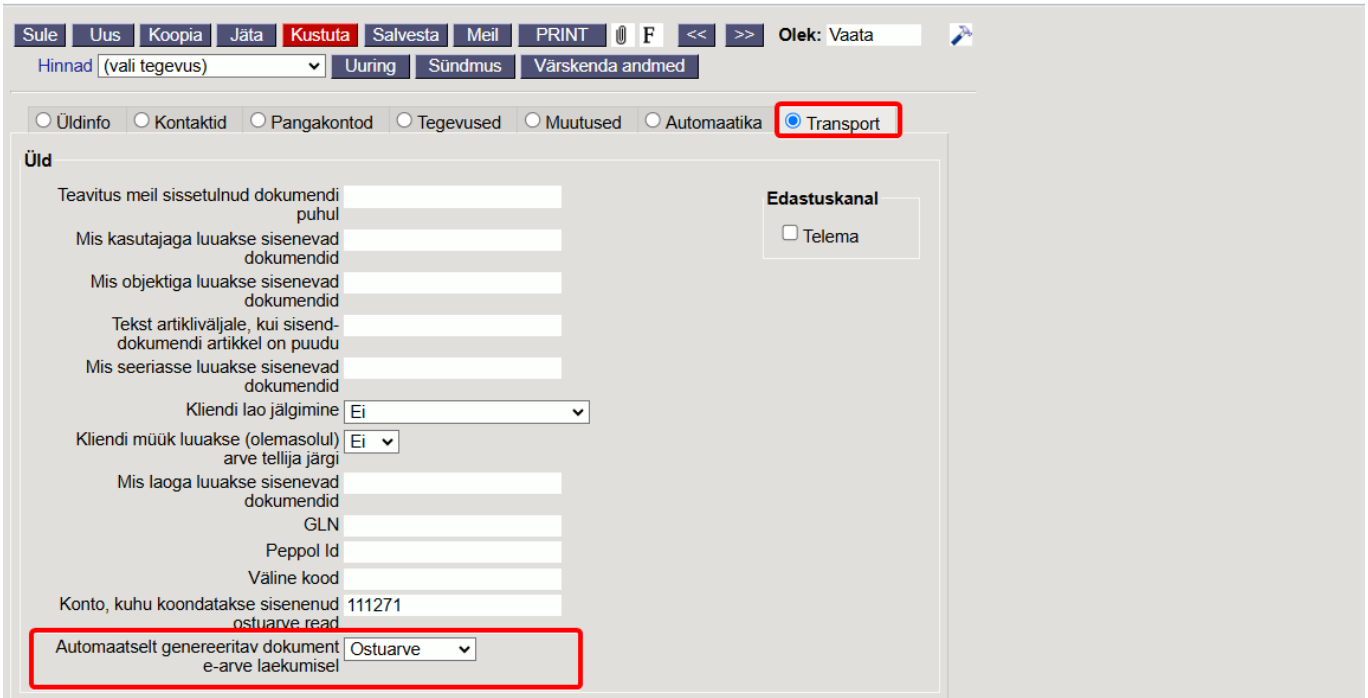
The virtual user is entered in the **User** field of the purchase invoice created from the imported e-invoice. Enter this user code in the field `System settings > Transport > Default user`.



The default user must have rights to Document transport and to purchase invoices, i.e. the right to create purchase invoices, because the purchase invoice is created as this user.



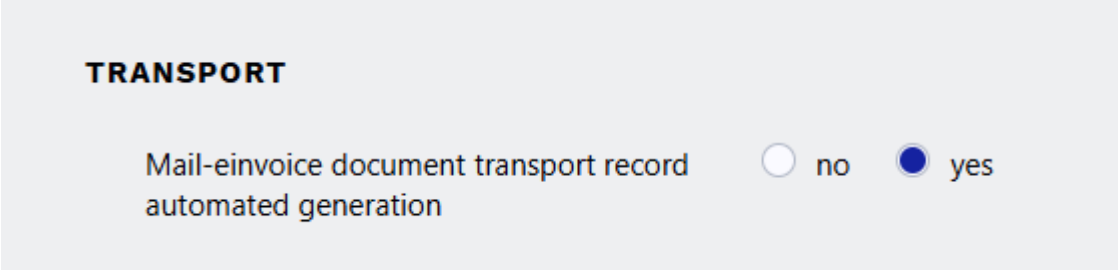
On the supplier card, on the **Transport** tab, make the following setting: in the field `Automatically generated document after e-invoice arriving` -> select „Purchase invoice“.



2. E-invoices received by e-mail

If the **e-invoice arrives by e-mail**, set the setting `Mail-einvoice document transport record automated generation` to YES.

For example, invoices received via *CostPocket* are in fact e-invoices sent by e-mail. For them to be processed correctly, this setting must be activated. As a result, an entry of the same type is created automatically in **Document transport** as when you send an e-invoice with a PDF to the data.directo.ee mailbox yourself.



Automatic purchase invoice posting

When a purchase invoice is created automatically, Directo fills in the header and rows in the same way a user would: the account and VAT code are taken from the supplier card. The automatic posting rules are based on the **Descr.** field of the purchase invoice row, so before creating rules it is worth knowing how this field is composed from the e-invoice XML.

After a purchase invoice is created from a received e-invoice, the purchase invoice row enrichment functionality, i.e. Supplier automation, is applied automatically.

The aim is to **enrich the row information** so that the user has as little work as possible in completing the invoice data and making it a valid accounting document. This functionality also

enables **significant time savings**, especially for purchase invoices with many rows (e.g. mobile phone bills).

In supplier automation, you **define rules**: which text an e-invoice row must contain for the desired account, VAT code, objects etc. to be applied to that row. In addition to a specific text, a link to the personnel register can also be required, to identify the person/employee related to the invoice row and fill in the above fields accordingly.

Automatic purchase invoice confirmation

In supplier automation, you can set either all purchase invoices or only e-invoices matching specific rules to be confirmed automatically. You can also define rules under which purchase invoices are created from e-invoices automatically but always left unconfirmed.

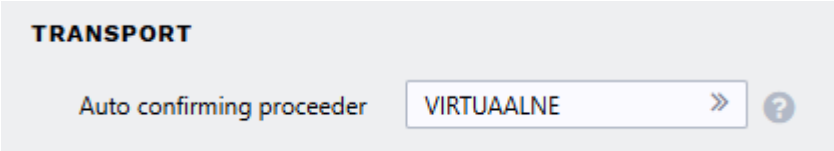
If the **Confirm** checkbox is ticked on an automation rule, the purchase invoice created from the e-invoice is confirmed automatically.

If a purchase invoice is not confirmed under a Confirm rule, try confirming it manually. If that fails, check that all requirements are met – required object levels are filled in, accounts and VAT codes exist, etc.

Automatic confirmation when purchase invoices go through proceeding

To confirm purchase invoices automatically when proceeding is used, set a robot (user) in `System settings → Transport → **Auto confirming proceeder**`. This user always completes the proceeding of the purchase invoice automatically.

You can use the same user that was created for creating purchase invoices automatically (`System settings → Transport → Default user`). The automatic confirmation user does not need a user group or purchase invoice proceeding points. It is important that this is a separate user who does not take part in the regular proceeding process.



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Last update: **2026/10/28 12:25**