

Invoice Link

User Guide

Latest Version: 26.1.0.0000

September 2025

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1 Problem Statement

Resellers working with **Continia** often face a repetitive challenge: every month they receive a consolidated invoice from Continia listing all purchased product subscriptions along with the corresponding customer details.

In a typical ERP workflow, this requires **manual data entry**:

- Creating **purchase invoice** against Continia as the vendor.
- Create **sales invoices** for customer.

This manual process is time-consuming, error-prone, and adds unnecessary operational overhead.

2 INTRODUCTION

Invoice Link automates this process by leveraging the OCR capabilities of Continia Document Capture. When Document Capture processes the Continia invoice and creates the purchase invoice in Business Central, Invoice Link automatically generates the corresponding **sales invoice for customer**, based on the product and customer information included in the invoice.

This eliminates manual work, ensures accuracy, and accelerates the invoicing cycle for resellers.

3 INVOICE LINK PREREQUISITES

3.1 Dependency on Continia Document Capture

Invoice Link has a dependency on Continia Document Capture. This means that if Document Capture is not already installed in your environment, it will be automatically installed during the Invoice Link installation.

Important: Automatic installation does not cover configuration. You must still complete the setup and configuration of Document Capture before Invoice Link can function properly. Check [Continia Documentation](#) for activation and configuration of Document Capture App.

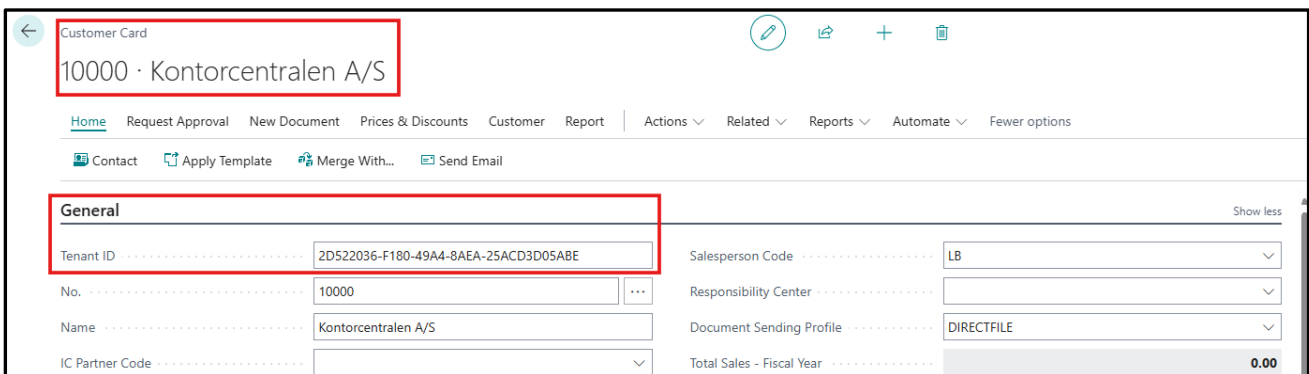
3.2 Verify Continia Setup

Once Continia Document Capture is installed and configured, confirm that it is functioning correctly before proceeding with the Invoice Link setup.

3.3 Add Tenant ID to Customer Cards

For each customer that you expect to generate sales invoices for, enter the **Tenant ID** in the Customer Card (see screenshot below).

Note: The Tenant ID is a key identifier that Invoice Link uses to match customers with their corresponding details on the invoice received from Continia.



Customer Card

10000 · Kontorcentralen A/S

Home Request Approval New Document Prices & Discounts Customer Report Actions Related Reports Automate Fewer options

Contact Apply Template Merge With... Send Email

General Show less

Tenant ID	2D522036-F180-49A4-8AEA-25ACD3D05ABE	Salesperson Code	LB
No.	10000	Responsibility Center	
Name	Kontorcentralen A/S	Document Sending Profile	DIRECTFILE
IC Partner Code		Total Sales - Fiscal Year	0.00

3.4 Update Document Journal Templates

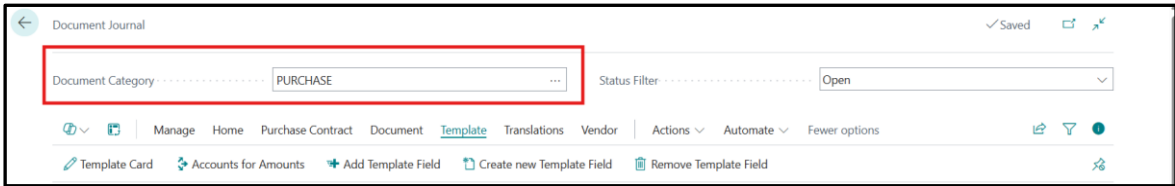
After entering Tenant IDs, you must add this field (along with other required fields) to the **Document Header** and **Document Lines** within the **Continia Document Journal**.

Continue to the [Template Field Setup](#) section for detailed instructions on how to configure these fields.

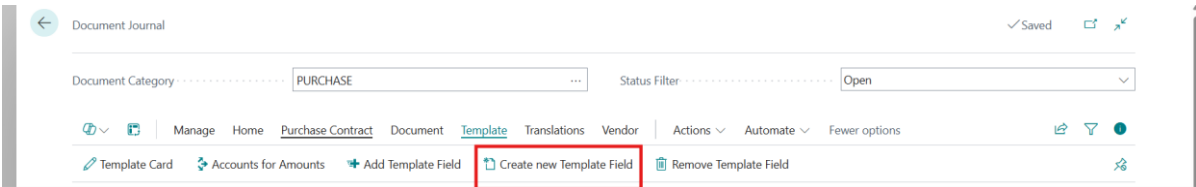
4 Template Field Setup

4.1 Setting up Header Fields

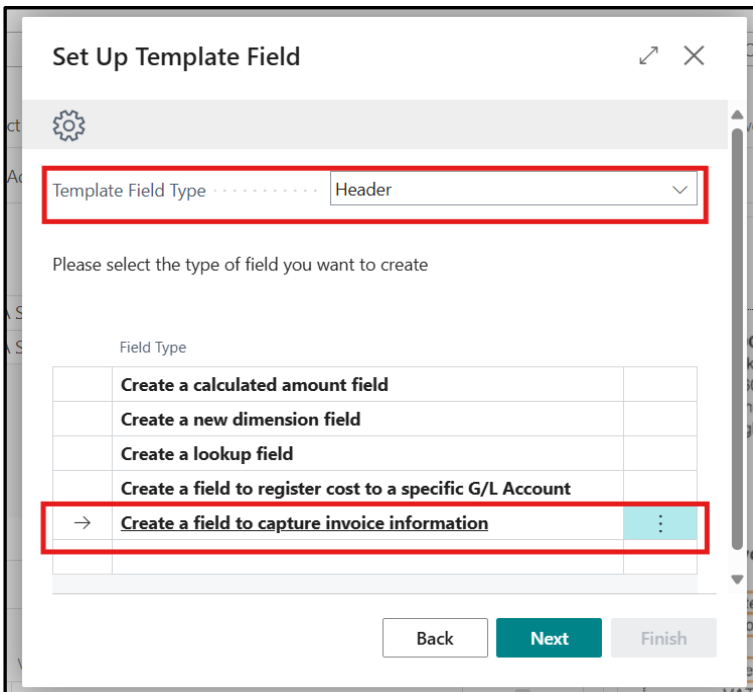
1. On Document Journal Page, make sure you are in Document Category **Purchase** (as seen in the screenshot below).



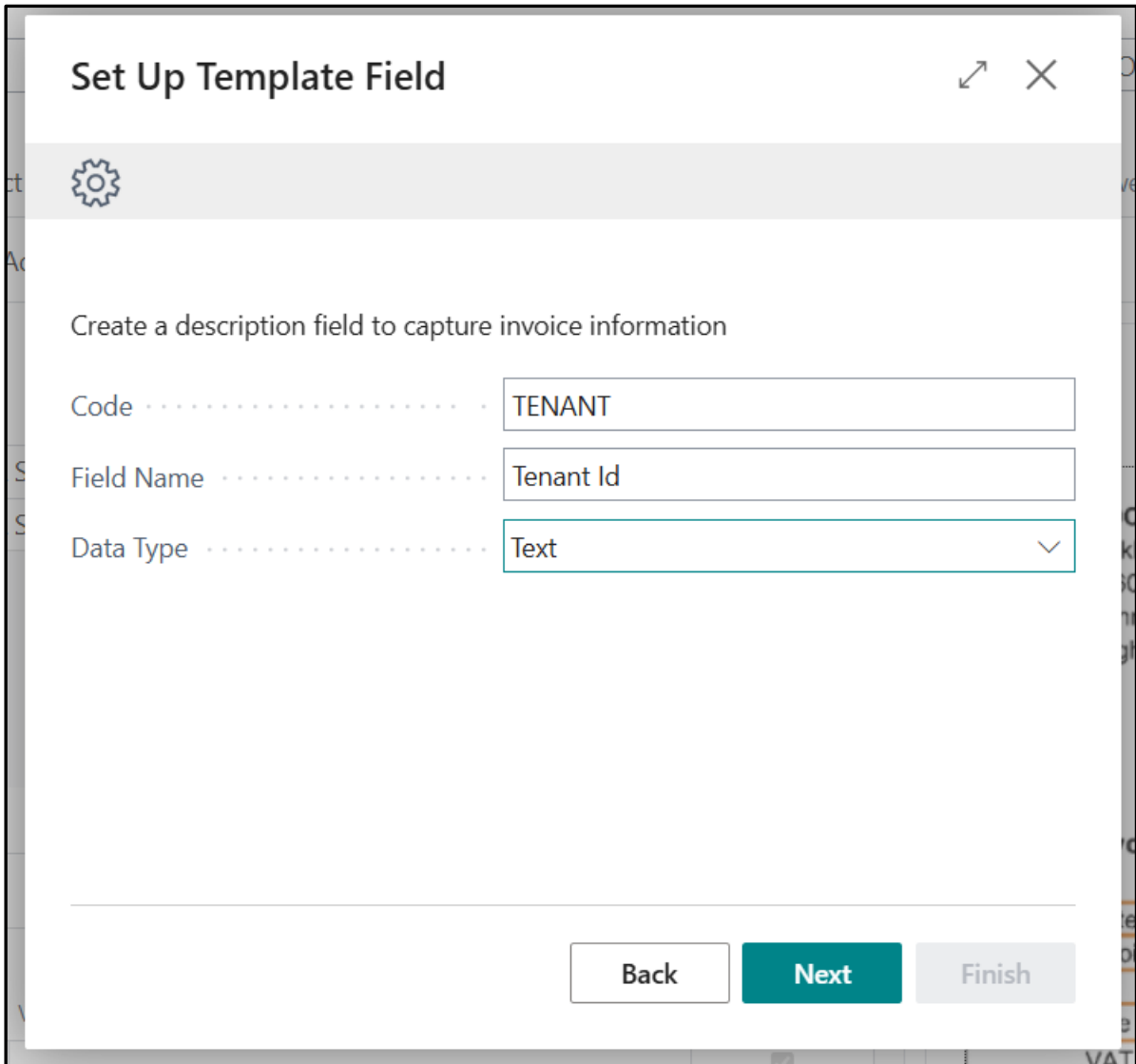
2. Click the action **Create new Template Field**.



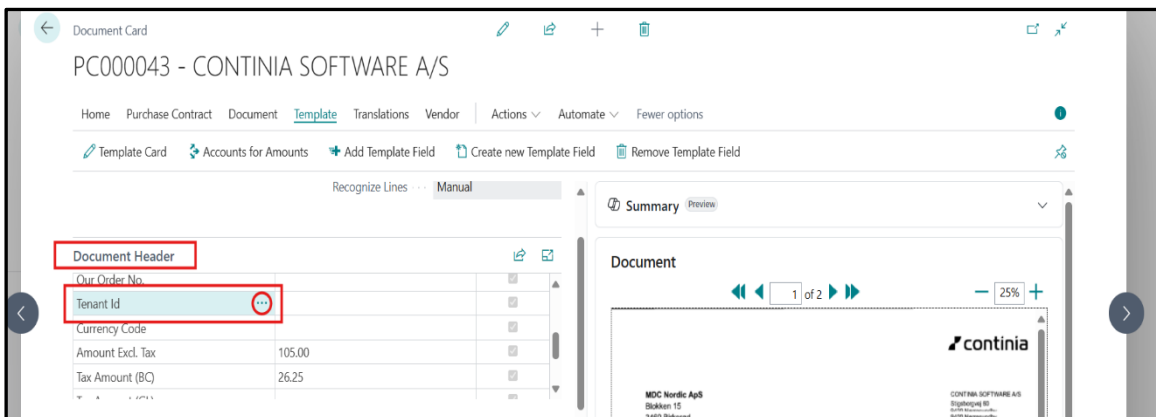
3. A setup wizard will popup select the highlighted option and click **Next** (as seen in the screenshot below).



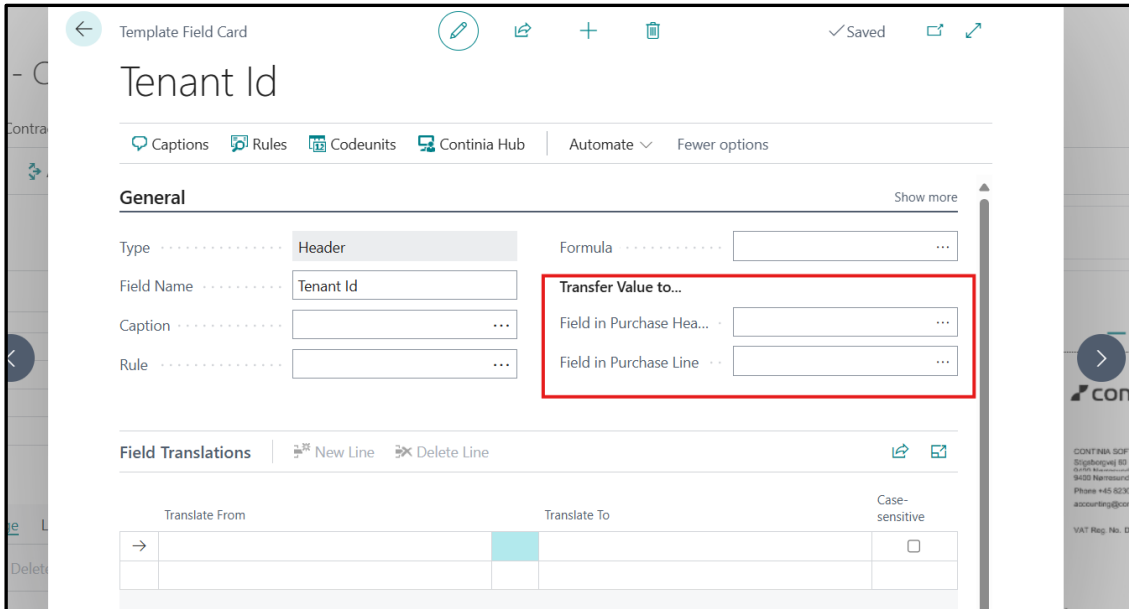
4. On the next page fill in the fields as seen in the screenshot below, you can have your own values for field **Code** and **Field Name** but make sure they are meaningful. Once the fields are filled, click **Next** and then **Finish**.



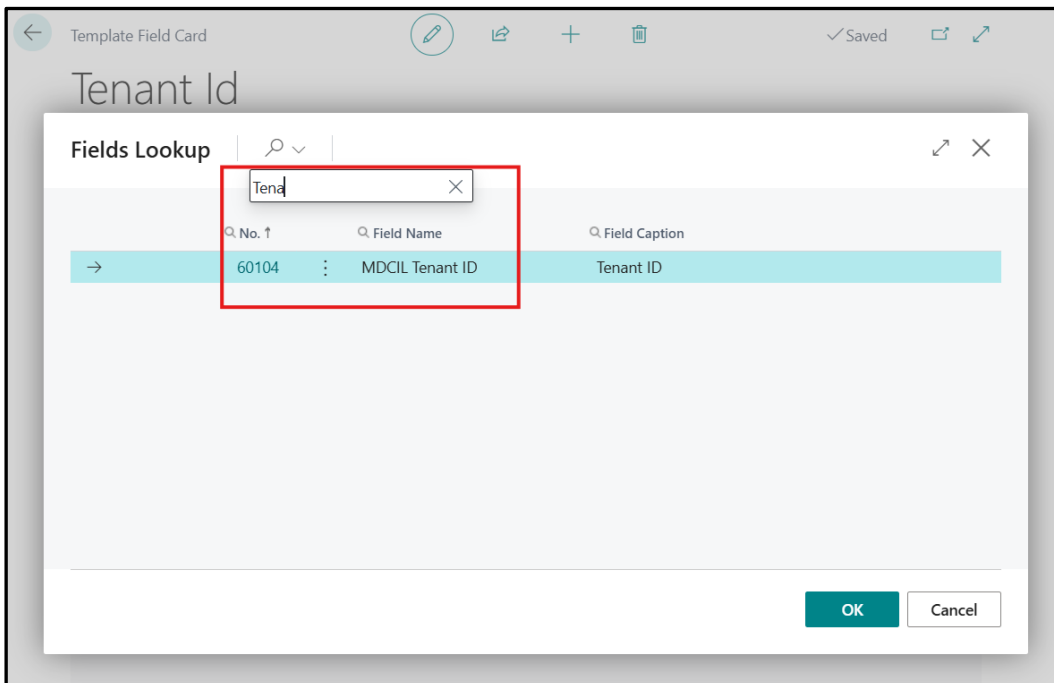
- Now the Tenant Id field has been added to the template header, and we need to map it. On the Document Journal page with Purchase selected as Document Category, click any invoice that is ready to be registered to open the Document Card. On the Document Header scroll down to the Tenant Id field and click on the three dots (as seen in the screenshot below).



- On the opened page under the **Transfer Values to**, select the three dots in front of the **Purchase Header field** (as seen in the screenshot below).

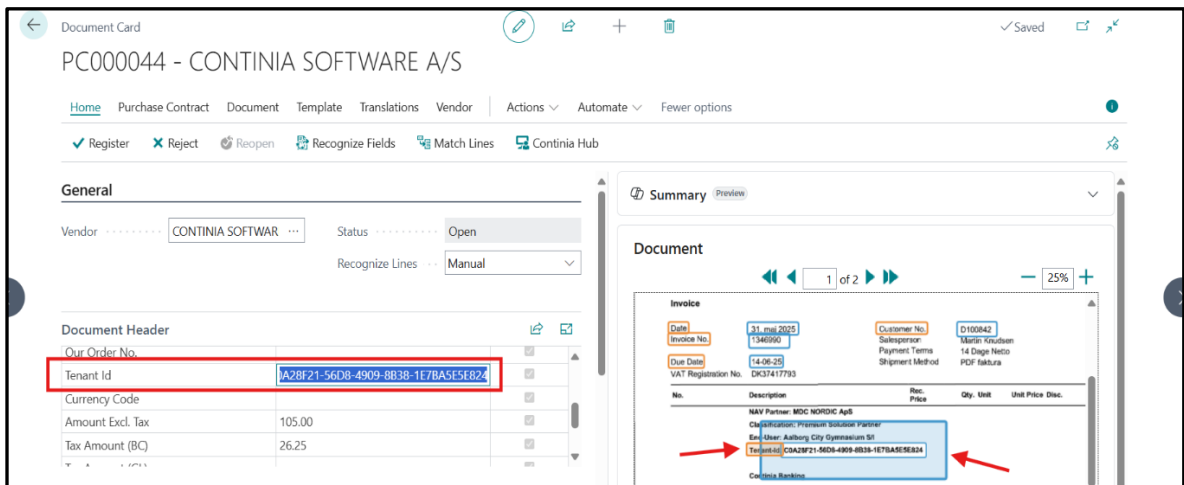


- On the open page search Tenant, you will see the field **MDCIL Tenant ID** select the field and press **OK** (as seen in the screenshot below).



The **Tenant ID** field has now been added to the template and mapped to the Purchase Header.

- The next step is to train the recognition engine to identify it on the document. On the Document Card, use the invoice preview shown in the Document FactBox on the right. Select the **Tenant ID** field in the Document Header Section, then mark its caption and value on the invoice. To mark the caption, right-click and draw an orange square around the heading **Tenant ID**. To mark the value, left-click and draw a blue square around the corresponding value next to the heading. This ensures that recognition knows where both the caption and value of Tenant ID field are located on the document.

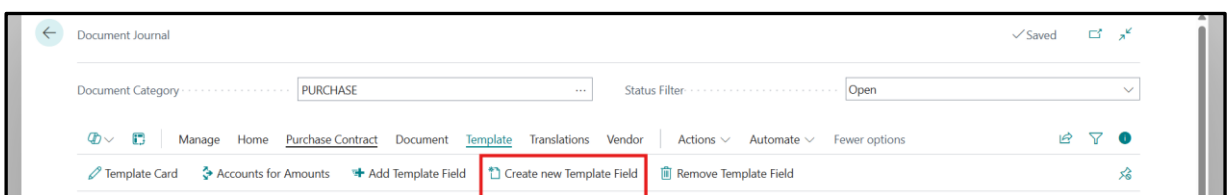


Orange box is caption and Blue box is value.

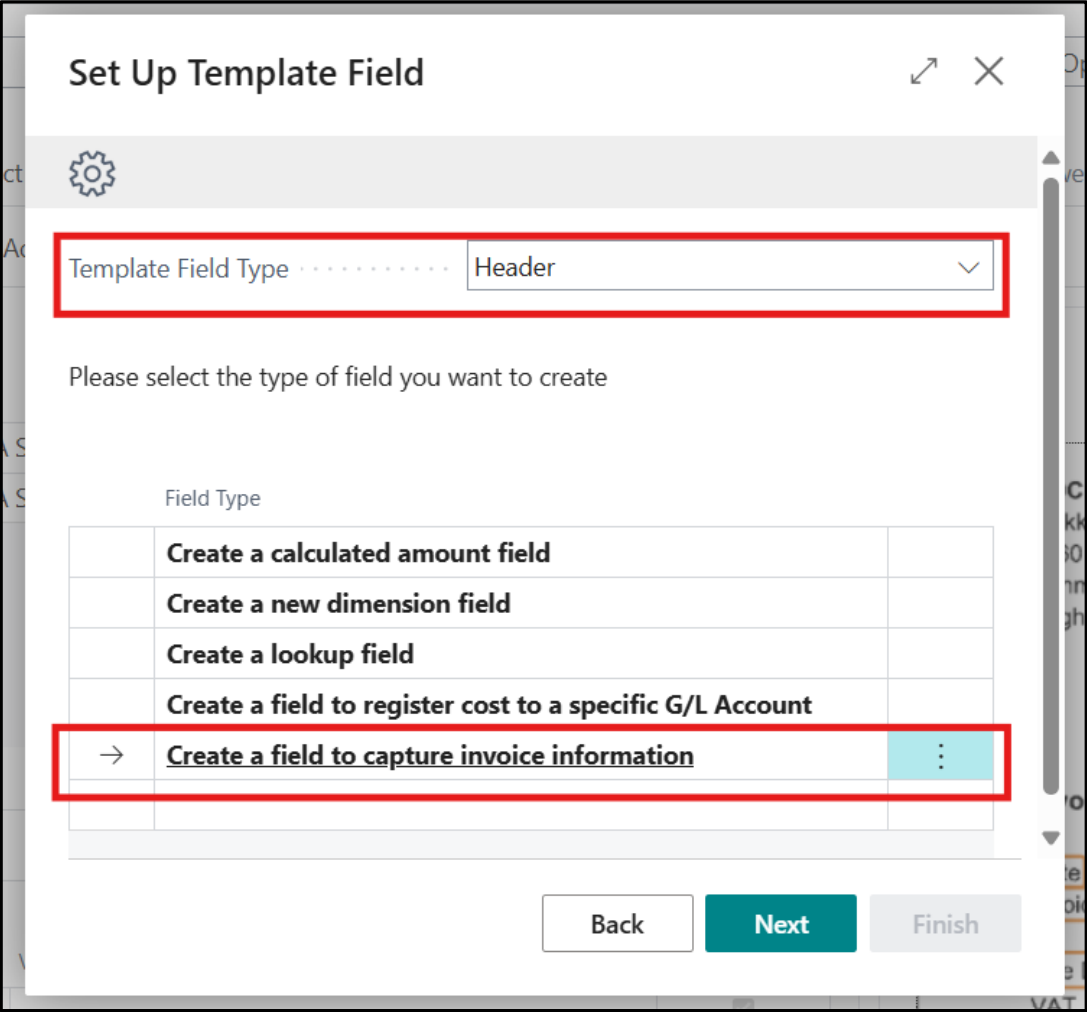
Now, this field has been added to the Purchase Header, Next step will be to adding Price to the lines.

4.2 Setting up Line Fields

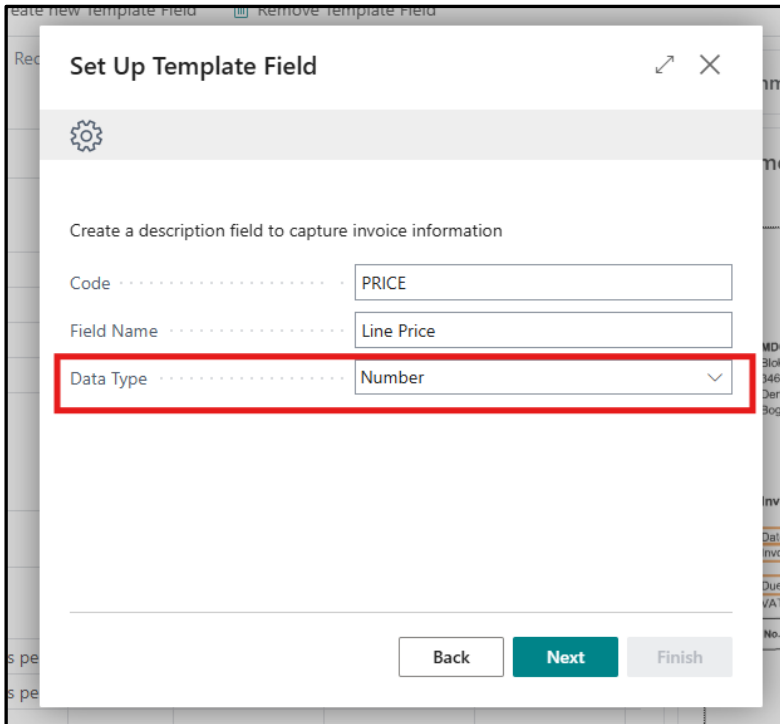
- For adding the Price Field in Template almost same procedure will be followed. To add the new Line Field of Price, Just Click the **Create new Template Field** action (as seen in screenshot below).



2. A setup wizard page will appear (as seen in screenshot below). Make sure you select the highlighted options and click **Next**.

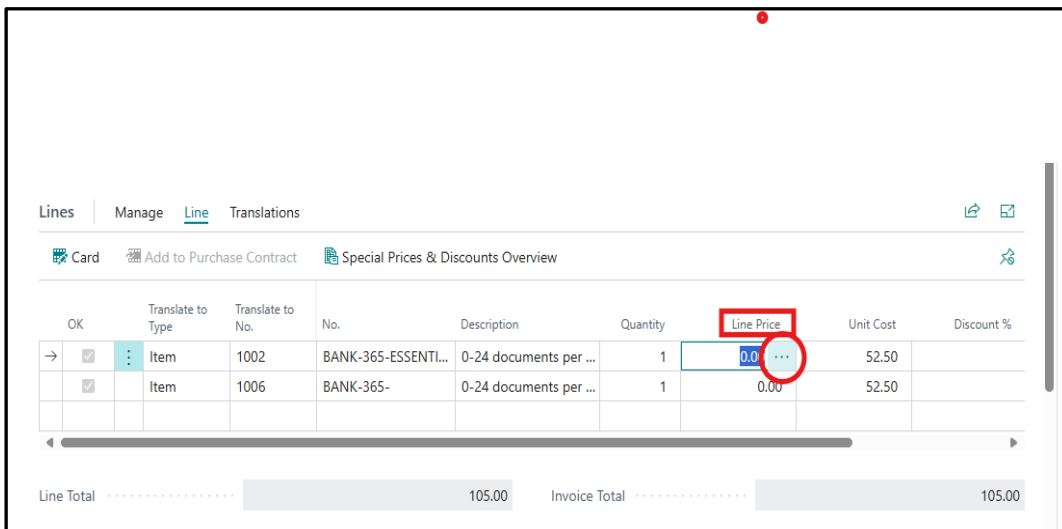


3. Ensure that your next page looks like the one as seen in the screenshot below and click **Next**.

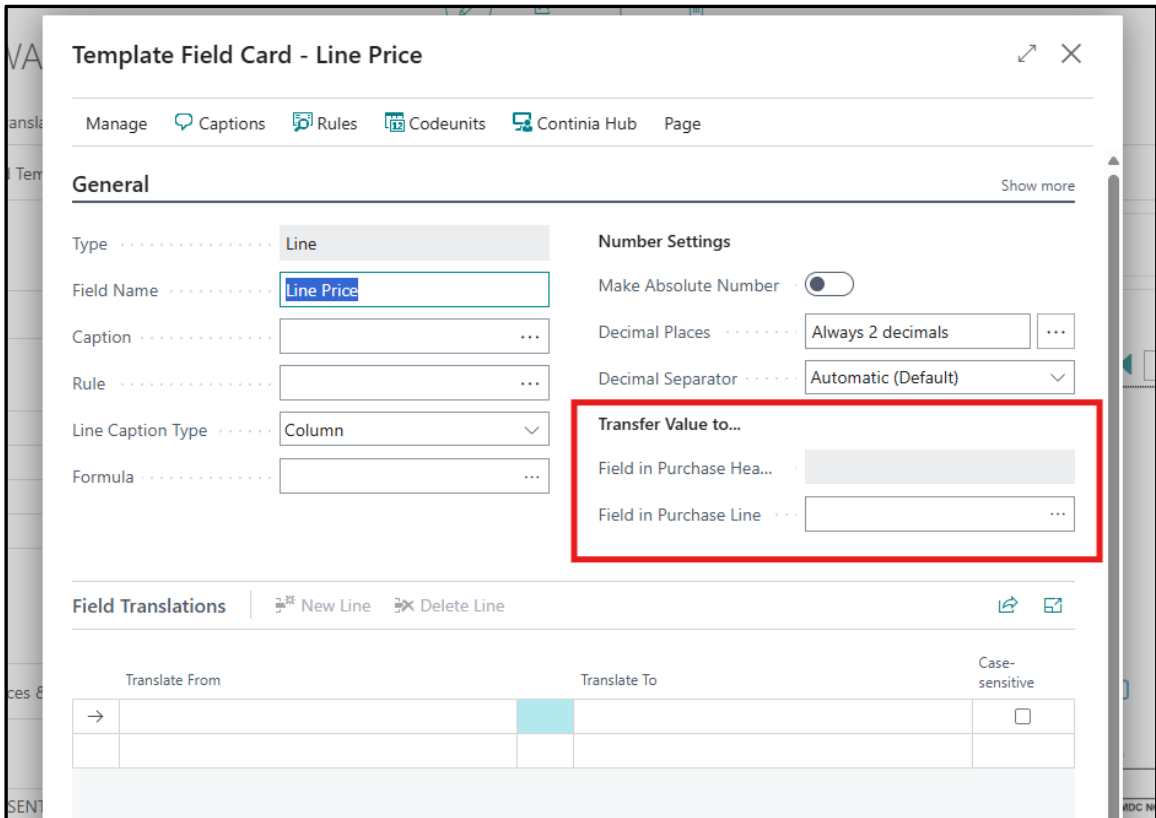


Now the new Line Price field is created, we need to map it to the table.

- On Document Card, scroll down to the line section, on the **Line Price** field click on the highlighted three dots (as seen in the screenshot below).

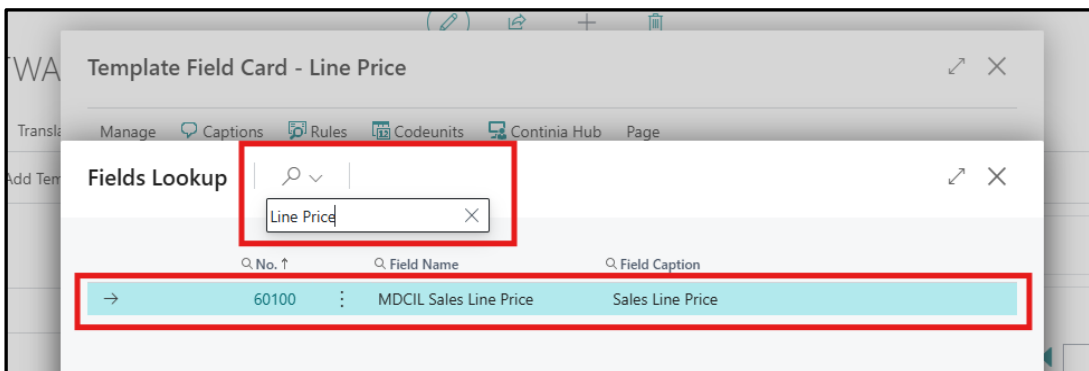


- On the Template Field Card, under the **Transfer Value to** click on the three dots in front of the **Field in Purchase Line** (as seen in the screenshot below).



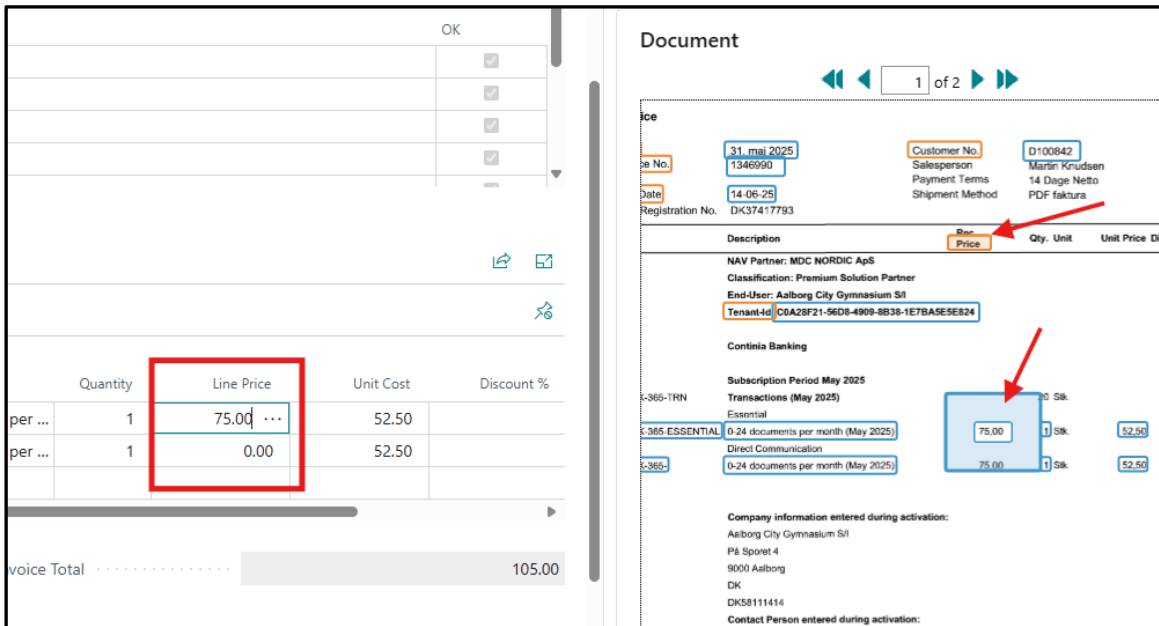
6. On the Fields Lookup page search **Line Price** select the field **MDCIL Sales Line Price** and press **OK**.

Mapping is complete and now we will capture its value.



7. To ensure that the value of the field is captured every time you receive an invoice in the same format, you need to train the recognition system by identifying both the caption and the value on the document. On the Document Card, in the invoice preview shown in the Document FactBox on the right, go to the header row and draw a square around the caption (Rec. **Price**) by holding down the right mouse button. This will highlight the caption with an orange square, telling the system where the field heading is located. Next, to capture the value, draw a square around the first line price using the left mouse button. This will highlight the value

with a blue square. Once completed, the recognition system will automatically pick up this field and its value every time an invoice of the same format is processed.



5 Necessary Configurations:

5.1 Comment Propagation

When recognizing purchase invoices, you may come across lines that should be treated as comments rather than standard invoice lines. To ensure these lines are propagated as comments, some additional configuration is required.

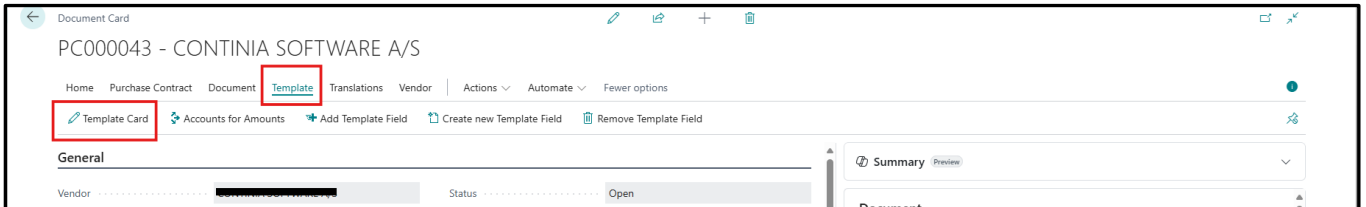
Currently, there is no built-in **Comments** field in the **Continia Document Journal**, unlike the standard purchase or sales journals (see picture below).

To include comments in your purchase and sales invoices, you need to use a **dummy item**. This allows you to map the description from the invoice as a comment. However, there are **two important points** you must keep in mind when using this approach:

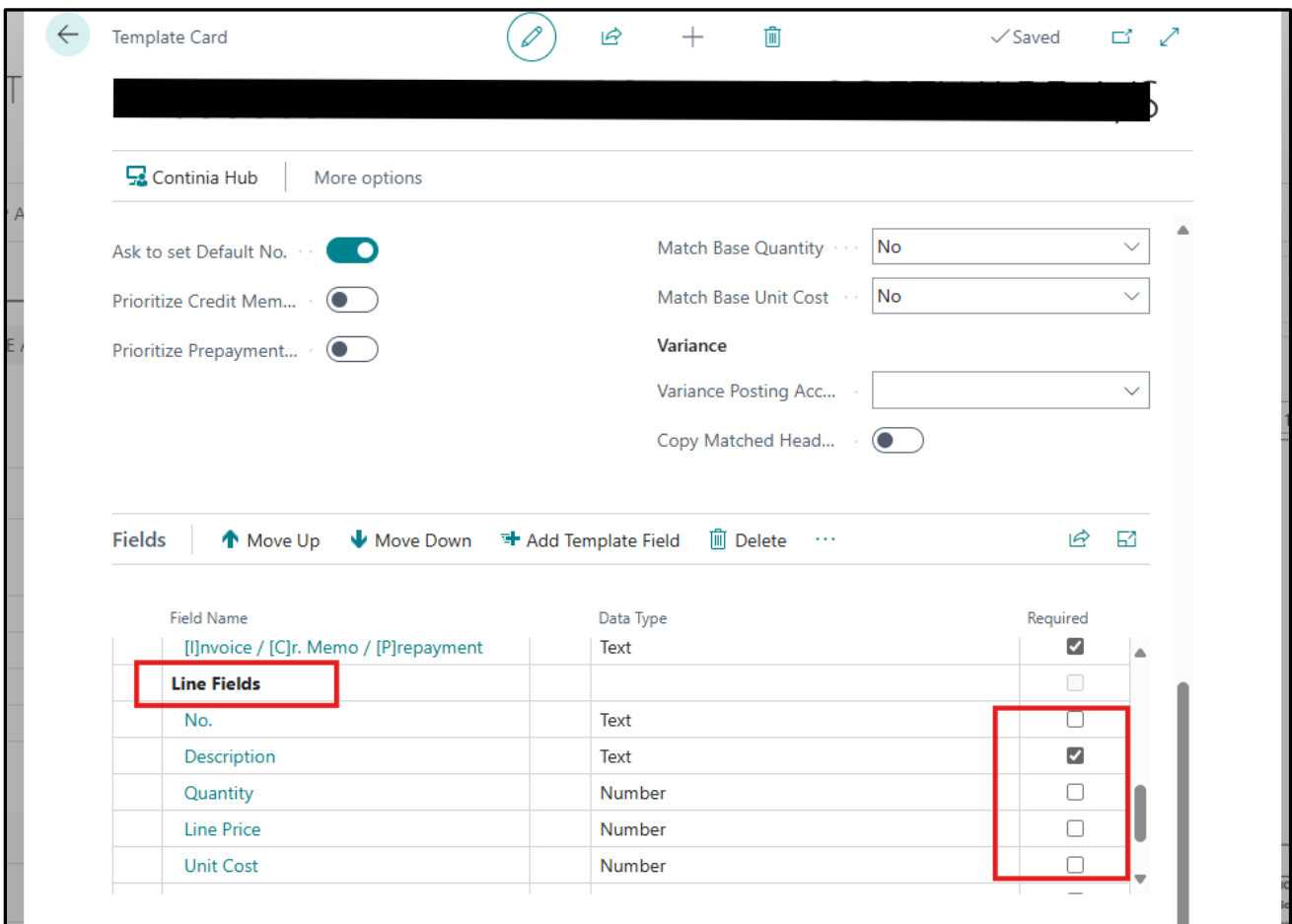
5.1.1 Configure the Template in Document Journal

For the template you are using in the **Document Journal**, you need to ensure that only the Description field is set as **Required**.

Follow the steps illustrated in the pictures below to set this up correctly.



Step 1



Step 2: In Required column only description must be set true.

5.1.2 Leave Quantity Empty for Comment Lines

To have the dummy item line recognized as a **comment**, make sure the **Quantity field is left empty** (see picture below).

Note: You only need to perform these steps once or twice for a given invoice format. After that, when invoices of the same format are received from the same vendor, the Recognizer system will automatically handle it for you.

The screenshot shows an invoice processing interface. On the left, a table lists invoice lines with columns for 'OK', 'Translate to Type', 'Translate to No.', 'No.', 'Description', 'Quantity', 'Line Price', 'Unit Cost', and 'Discount %'. Red and blue arrows point to specific rows in the table. On the right, a 'Document' summary panel displays invoice details such as 'Date', 'Invoice No.', 'Customer No.', and 'Description'. A red arrow points to a 'Subscription Period May 2025' entry in the document details.

OK	Translate to Type	Translate to No.	No.	Description	Quantity	Line Price	Unit Cost	Discount %
<input checked="" type="checkbox"/>	Item	1000		Continia Banking		0.00		
<input checked="" type="checkbox"/>	Item	1000		Subscription Period ...		0.00		
<input checked="" type="checkbox"/>	Item	1000		Transactions (May 20...		0.00		
<input checked="" type="checkbox"/>	Item	1000		Essential		0.00		
<input checked="" type="checkbox"/>	Item	1003	BANK-365-ESSENTI...	0-24 documents per ...	1	75.00	52.50	
<input checked="" type="checkbox"/>	Item	1000		Direct Communication		0.00		
<input checked="" type="checkbox"/>	Item	1006	BANK-365-	0-24 documents per ...	1	75.00	52.50	

6 Sales Invoice Creation

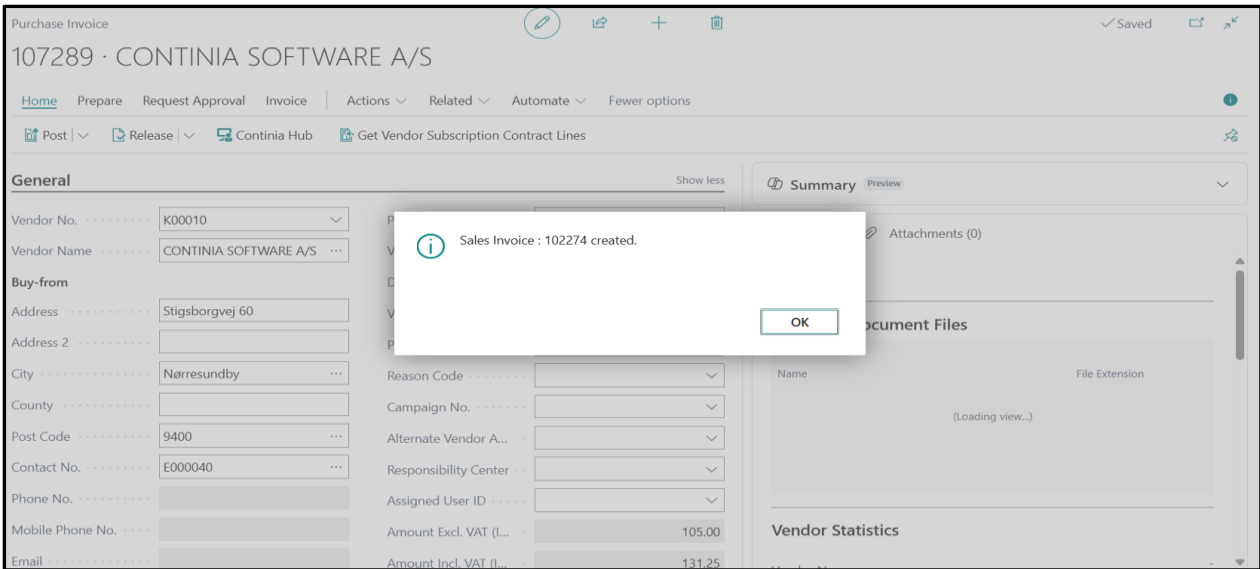
Once you have addressed all Error-type comments (shown in red) under the comments section, your invoice is ready to be registered.

Click **Register** to create the **Purchase Invoice**.

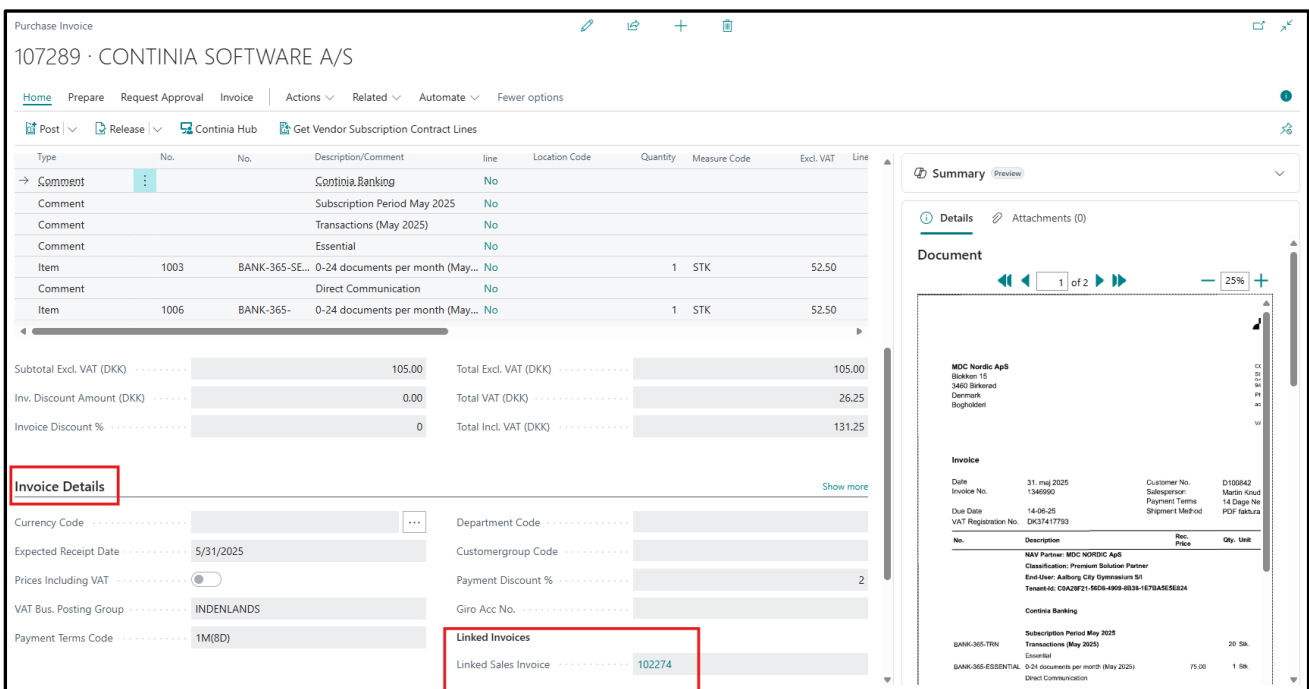
The screenshot shows the 'Document Card' for 'PC000046 - CONTINIA SOFTWARE A/S'. At the top, there are navigation tabs: 'Home', 'Purchase Contract', 'Document', 'Template', 'Translations', 'Vendor', 'Actions', 'Automate', and 'Fewer options'. A red box highlights the 'Register' button. Below the navigation is a table of invoice lines. At the bottom, a 'Comments' section is highlighted with a red box, showing a 'Comment' field and a 'Configurable' status. On the right, a 'Document' summary panel displays invoice details, including 'Date', 'Invoice No.', 'Customer No.', and 'Description'. A red box highlights a 'Subscription Period May 2025' entry in the document details.

Item	No.	Description	Quantity	Line Price	Unit Cost
Item	1000	Continia Document ...		0.00	
Item	1000	Subscription Period ...		0.00	
Item	1000	Transactions (May 20...		0.00	
Item	1000	Essential		0.00	
Item	1003	DC-365-ESSENTIAL	1	400.00	280.00
Item	1000	Advanced Capture		0.00	
Item	1005	DC-365-ADVCAPTU...	1	337.00	235.90
Item	1000	Order Matching		0.00	
Item	1007	DC-365-MATCHING	1	252.75	176.92
Item	1000	Document Approval		0.00	

As soon as the purchase invoice is created, the corresponding **Sales Invoice** will be automatically generated. A message will appear showing the **sales invoice number** for the customer whose **Tenant ID** was captured by the Recognizer from the invoice PDF (as seen in the screenshot below).



After clicking **OK**, you can view the generated **Sales Invoice** by navigating to the **Invoice Details** Fast Tab. At the end of the Fast Tab, you will see the invoice number against the field **Linked Sales Invoice**, which you can click to **drill down and open** the invoice (as seen in the screenshot below).



Sales Invoice

102274 · Kontorcentralen A/S

Home Prepare Print/Send Request Approval Invoice More options

Post Release

✓ Saved

General Show more

Customer Name: Kontorcentralen A/S Document Date: 5/31/2025

Sell-to: Posting Date: 5/31/2025

Contact Phone No.: VAT Date: 5/31/2025

Contact Fax No.: Due Date: 6/30/2025

Contact E-Mail: robert.townes@contoso.com Status: **Open**

Contact Role: Document Capture Attachments: -

Contact: Robert Townes

Lines Manage Line

Select items... New Line Delete Line

Type	No.	Item Reference No.	Description	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. VAT	Line Discount %	Line Amount Excl. VAT	Qty. to Assign	App. For Serv. Decl.	Department Code	Customergro. Code	Accou.
Comment			Continia Banking							0	<input type="checkbox"/>			
Comment			Subscription Period May 2025							0	<input type="checkbox"/>			
Comment			Transactions (May 2025)							0	<input type="checkbox"/>			
Comment		RO	Rejseomkostninger							0	<input type="checkbox"/>		MELLEEM	
Item		1003	0-24 documents per month (Ma...		1	STK	75.00		75.00	0	<input type="checkbox"/>		MELLEEM	
→ Comment			Direct Communication							0	<input type="checkbox"/>			
Item		1006	0-24 documents per month (Ma...		1	STK	75.00		75.00	0	<input type="checkbox"/>		MELLEEM	