Optira Platform Invoice Processing Guide

1.Login

- Go to website Optira (https://demo.optira.ai/auth/) and Click on login button.
- Enter email and password then continue.

Optira Al-based Document Processing &	Analytics Platform	
	Sign In to the Optira Platform	
	Email ()	
	Email is required Password 2	
	Forgot Password ?	
	Continue	
A Real-world Al Product by		
All Rights Reserved © 2024 - ThirdEye Data (USA)	Sales Support	

2. Intelligent Document Processing

Once login to website follow the below steps to Process the documents.

• Click on Intelligent Document Processing as shown below screenshot.

Intelligent Document 📚 Processing	
Optira harnesses the power of Gen AI, overcoming the limitations of traditional OCR technologies, to automate data processing over all such documents. It makes document processing fast, efficient, error-free, and cheaper than ever before.	

• Select "**Invoices**" option as shown in the below screen shot to process the invoice documents.

Intelligent Document Processi	ng 1				
Invoices	Len (Bank Statements	lati (Handwritten	hati
Extract invoice ID, customer details, venc to, bill to, total tax, subtotal, line item		Extract customer ID, customer details, ac and Dump into csv, sql table		Extract key value pairs and struct selection marks from any form	
Processed Count	6	Processed Count	0	Processed Count	o
Unprocessed Count	4		0	Unprocessed Count	0
Total Count	10		0		0

2.a) Upload and Process files

- Follow below steps to Upload the single or Multiple documents.
 - 1. Click on Upload Document,
 - 2. Click on Drag media,
 - 3. Click on submit

Opti	ra 🕼									2	Sign Out	
Docum	nents Libra	ary		Upload Doc	ument							
+ Upl	load Docum	ent		[•		vort		
Pro	cessed Dobu	monts Unp			Drag media here to uploa	d or connect an account						
		invo	bice_2					1	Review			
			pice_1		Connect to an ex	ternal datasource			Review			
		170 Invo	5200392_yPCa6fuNa		Sul	omit	3		Review	Download ~		
		What invo	atsApp Image 2024-	7/23/20	024, 9:16:51 AM				11 10 10 10	ad ~		

• Once files are uploaded, the uploaded files are present in 'Unprocessed Documents' section.

Optira 🐲	Intelligent Document Precessing			Sign Out
Documents Lib	orary			
+ Upload Docur	ment		C Process	🔒 Export 😇 Chat
Processed Doc	cuments Unprocessed Documents			
0	invoice_5	7/23/2024, 5:15:35 PM		Process
0	invoice_4	7/23/2024, 5:15:34 PM		Process
0	invoice_3	7/23/2024, 5:15:33 PM		Process

• To Process the Uploaded file go to Unprocessed Document section and click on 'process' icon.

Optin	a 🛟	Intelligent Document Precessing				X	
Docum	ents Library						
+ Uplo	oad Document			ļ	Process	£ Export	📮 Chat
		nts Unprocessed Documents					
		invoice_5	7/23/2024, 5:15:35 PM			Process	
	•	invoice_4	7/23/2024, 5:15:34 PM			Process	U

• After that you will be able to see your processed file as shown below screen shot.

Optira 🤹 Intelligent Do	cument Precessing									1	Sign Out
Back to Document Library View						Process	JSON Result		🏦 Expe	ort	🗐 Chat
💂 Preview Document						Processed Documents					
CE	QUANTITY	UNIT	DISC. AMT	SUB TOTAL MYR	^	bill_To : "WALK- IN CUSTOMER"					
		PRUCE	PP11	MTR		delivery_To : "WALK- IN CUSTON	AER"				
THERSHIELD BS B-TENAGA GREY	1.000 DRU	394.8000	-20.00	374.80		account_No : "380/000"					
					2	quotation_Ref : "" sales Person : ""					
IRE EXTER. & INTER. SEALER 15527	1.000 DRU	155.0000		155.00		terms : "0 Days"					
RUSH C.S 086 - 1"	1.000 PCS	1.2000		1.20		sub_Total : "543.00"					
A MALLON	2.000 PCS	6.0000		12.00		rounding : "0.00"					
						grand_Total : "543.00"					
						received_Goods_In_Good_Order_	&_Condition : ""				
						authorised_Signature : ""					
						scanned_With : "CamScanner"					
						REF DESCRIPTION_OF_PRODUCT_/		QUANTITY	UNIT_PRICE	DISCAMT	SUB_TOTAL_MYR
						1 18L DULUX WEATHERSHIELD B VOUCHER:QZR34	S B-TENAGA GREY	1.000 DRU	394.8000	-20.00	374.80
						2 18L DULUX INSPIRE EXTER. & IN 15527	NTER. SEALER	1.000 DRU	155.0000		155.00
						3 CHINA NYLON BRUSH C.S 086	-1	1000.0015	in telefort		1.20
						4 7 R/REFILL ANZA MALLON		1	0.0		12.00
		C1 8	TOTAL :	543.00	· · · ·			0			

- To come back from the previous page, click **Back to Document Library View**.
 - 1. Click On Json Result To see in processed document in Json format.

Optira 🔹 Intelligent Do					Sign Out
Back to Document Library View					Chat
💂 Preview Document					Processed Documents
æ	QUANTITY	UNIT	DISC.	SUB TOTAL	bill_To : "WALK- IN CUSTOMER"
		PRICE	AMT	MYR	delivery_To : "WALK- IN CUSTOMER"
THERSHIELD BS B-TENAGA GREY	1.000 DRU	394,8000	-20.00	374.80	account_No : "380/000"
	1.000 0.00	371.0000	-20.00	374.00	quotation_Ref : ""
RE EXTER. & INTER. SEALER 15527	1.000 DRU	155.0000		155.00	sales_Person : ""
USH C.S 086 - 1"	1.000 PCS	1.2000		1.20	terms : "0 Days" sub_Total : "543.00"
MALLON	2.000 PCS	6.0000		12.00	rounding: "0.00"
		0.0000		12.00	grand_Total : "543.00"
					received_Goods_In_Good_Order_&_Condition : ""
					authorised_Signature : ""
					scanned_With : "CamScanner"
					REF DESCRIPTION_OF_PRODUCT_/_SERVICE QUANTITY UNIT_PRICE DISCAMT SUB_TOTAL_MYR
					1 18L DULUX WEATHERSHIELD BS B-TENAGA GREY VOUCHER:QZR34 1.000 DRU 394.8000 -20.00 374.80
					2 18L DULUX INSPIRE EXTER. & INTER. SEALER 1.000 DRU 155.0000 155.00
					3 CHINA NYLON BRUSH C.S 086 - 1 1.20
					4 7 R/REFILL ANZA MALLON
				543.00	· · · · · · · · · · · · · · · · · · ·

- Now your Processed files will be present in 'Processed Documents' Section.
 - 1. To download csv file follow below Screen shot steps.
 - 2. And to check your processed file click on Review option as shown below screenshot.

Opti	ra 🛟		Intelligent Document Precessing					Sign Out	
Docum	ents Libra	iry							
+ Uple	oad Docume	ent				Process	🗈 Export	🚍 Chat	
Proc	essed Docur	ments							
			invoice_5	7/23/2024, 5:15:35 PM			4 Review Download		
			invoice_3	7/23/2024, 5:15:33 PM			Review XLSX		
			invoice_2 invoice	7/23/2024, 5:15:32 PM	Proccessed		JSON Review		

Optira Support Portal Guide

1. Go to the support portal to raise a ticket. (https://optira.ai/raise-support-ticket/)

2. Login With Credentials provided for Support Portal.

OPTIRA	
Plat	orm Support
Please login to access the Customer Support Portal Username or Email Address	
Password	
☑ Remember Me	
Log In	

- 3. Click on Create a ticket
- 4. Fill Ticker Information with details, also you can upload(Photos, CSV, PDF/Docs, Zip, JSON and max file size: 2.0MB)
- 5. Click on Create Ticket.