
Document Insider - Invoice

User Manual

DEEPSITE LIMITED

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1 General Information

1.1 Purposes

This User Manual introduces the DEEPSITE Document Insider - Invoice for users including the interface and management functions to help users quickly log in, browse and use this system.

1.2 System Overview

Document Insider is a digitizing solution with AI-Powered Advanced Content Intelligence that can be quickly consumed as a service providing the ability to carry out a task like reading a document, digitizing an image or a table, extracting data interested, or any other tasks related to understanding and processing content as well as analyzing data. Document Insider also provides auto validation/ontology against with the data from user's database such as enterprise SAP using the extracted data from documents. In addition, Document Insider supports user feedback and continuous learning to improve precision via the cloud-based portal.

2 Getting Started

2.1 Logging on


Open the browser and enter the URL <https://document-insighter.godeepsite.com> to visit the login website as shown. User can log in and access DEEPSITE Document Insider ® Portal through the following URL. On the login page select the button  "Email" shown in the picture and click "Sign in" and then typing in your trial user account name and password:



Figure 1: Log on

2.2 Homepage

The system can archive data automatically with convenient and rich search capabilities. After logging in, click the “Invoice” icon on the left sidebar of the homepage.

Document Insighter®

Home Cases Upload

Document #

Receive Date

Start date - End date

Status Cancel All

Reviewing 2

Posting 5

Posted 584

New 573

Invalid 1

Draft 5

Document #

Document #

Tags

Edge 7

Advance

1,170 results found in 9ms

Document #	Category	Status	From	Date #
099009	Invoice	POSTED	@document-insighter.o	15/08/24 10:51
099011	Invoice	POSTED	@document-insighter.o	15/08/24 10:51
099011	Invoice	POSTED	@document-insighter.o	15/08/24 10:36
099029	Invoice	POSTED	@document-insighter.o	15/08/24 10:24
099052	Invoice	POSTED	@document-insighter.o	15/08/24 10:24
099027	Invoice	POSTED	@document-insighter.o	15/08/24 10:24
099010	Invoice	POSTED	@document-insighter.o	15/08/24 09:54
274030	Invoice	POSTED	@document-insighter.o	13/08/24 10:34
294631011	Invoice	POSTED	@document-insighter.o	13/08/24 10:34
294733273	Invoice	POSTED	@document-insighter.o	13/08/24 10:34
IN24060803	Invoice	POSTED	@document-insighter.o	13/08/24 10:34
1824004395	Invoice	POSTED	@document-insighter.o	13/08/24 10:34
TB240515-1	Invoice	POSTED	@document-insighter.o	13/08/24 10:34
294740177	Invoice	POSTED	@document-insighter.o	13/08/24 10:34
A240503004	Invoice	POSTED	@document-insighter.o	13/08/24 10:34
294733203	Invoice	POSTED	@document-insighter.o	13/08/24 10:34
INV-TNV-1512835	Invoice	POSTED	@document-insighter.o	13/08/24 10:34
24028-TEHKJB	Invoice	POSTED	@document-insighter.o	13/08/24 10:34
HKG24-2052	Invoice	POSTED	@document-insighter.o	13/08/24 10:34
7220148	Invoice	POSTED	toppan.testing@document-insighter.o	13/08/24 10:34

Prev 1 2 3 4 5 6 7 8 9 10 Next

Figure 2: Home Button

The filter panel provides users with more detailed filtering functions: 1. “Receive Date”: The email received date or uploaded date. 2. “Status”: Document processing status like “Posted” or “Modified”. 3. “Invoice #”: The Invoice number in the document. 4. “PO #”: The PO number in the document. 5. “Vendor”: The vendor name.

Document Insider ®

Home

Receive Date

Start date - End date

Status

Cancel All

☐ Reviewing2

☐ Posting5

☐ Posted584

☐ New388

☐ Draft5

Invoice #

Invoice #

Tags

☐ Edge7

PO #

Vendor

Figure 3: Search/Filter Panel1

2.3 Review Page for Invoice

2.3.1 Extracted Result Display

The extracted data, including headers, trading parties information, and line items, will be displayed on the right side of the page. Clicking on the extracted data will highlight the corresponding text in the document, allowing the user to quickly verify the results.

The screenshot displays the Document Insighter interface for reviewing an invoice. The left pane shows the original invoice document, and the right pane shows the extracted data. A blue line connects the 'Total' field in the invoice document to the 'Invoice Total' field in the extracted data panel.

Invoice Document Fields:

- Bill To: Hong Kong, Attn: Procurement Division
- Subject: Purchase Order Number: 41, 50% Deposit of Android API Level Upgr, Choice
- Table:

Qu. No.	Rep	Payment Terms	Description	Quantity	Rate	Amount
Q230340	Ivan	Net 30				
				1	16,000.00	16,000.00
Total						HK\$16,000.00

Extracted Data (Right Panel):

Header

- Invoice No.: 230340
- Order No.: 4182300293
- Invoice Date: 10/16/2023
- Due Date: 10/16/2023
- Payment Term: Net 30
- Incoterm:
- Currency: HKD16,000.00
- Sub Total:
- Total Tax:
- Total Surcharge:
- Total Discount:
- Invoice Total: 16000.0

Trading Parties

- Customer Name: Kowloon Bay, Kowloon, Hong Kong
- Bill To: Kowloon Bay, Kowloon, Hong Kong
- Vendor Name: LTD
- Vendor Address: Hung To Road, Kwun Tong,

Figure 4: Result Page

When extracting some numeric and date fields, the system automatically applies some post-processing algorithms to standardize their original values. For example, the “Invoice Total” in the document is represented as “HK\$16,000.00”, and the system standardizes it to a float number “16000.0” for easier integration by users. The original text in the document will be displayed in small gray font below each extracted result. Additionally, if users manually modify some extracted results, the modified results will also be displayed under the original results (rather than directly changing the system’s initial extracted results, but the newly modified results will be sent to the user’s receiving

server via the Post function).

The screenshot displays the Document Insighter interface for an invoice. On the left, a table shows the invoice details:

Quo. No.	Rep	Payment Terms
Q23	Ivan	Net 30

Quantity	Rate	Amount
1	16,000.00	16,000.00

Total	HK\$16,000.00
--------------	----------------------

On the right, the 'Header' section of the invoice is shown with the following details:

- Invoice No.: 230340
- Order No.: 4182300293
- Invoice Date: 10/16/2023
- Due Date: mm/dd/yyyy
- Payment Term: Net 30
- Incoterm:
- Currency: HKD16,000.00
- Sub Total:
- Total Tax:
- Total Surcharge:
- Total Discount:
- Invoice Total: 16000.0
- Item No.:

Annotations in the image highlight specific values:

- A green box labeled 'Original Text in Document' points to the '16/10/2023' date in the top left table and the '16/10/2023' date in the 'Invoice Date' field.
- A red box labeled 'Standardized Value or Revised Value' points to the '2023-10-16' date in the 'Invoice Date' field and the 'HK\$16,000.00' total in the bottom right table.

Figure 5: Standardized Value and Original Text

2.3.2 Revise Extracted Results

Click the edit icon to open the edit panel and revise the extracted results.



Figure 6: Revise Icon

Edit Row

Item No.

Code

Description

1. Sco

Unit Price

16000.0

Quantity

1.0

100

Total Price

16000.0

18000

Remarks

Save

Figure 7: Revise Results

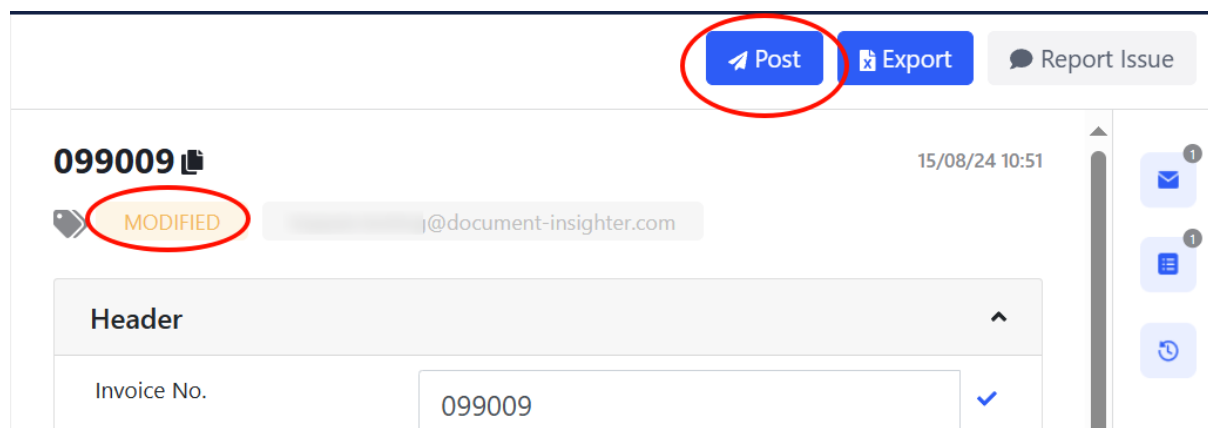
Clicking the “Save” button will display a green checkmark behind the edited item. Hovering over the icon will reveal the last revision record.

[illegible]

Figure 8: Revise Record

2.3.3 Post the Revised Results to Your Server


After the user revises and saves the results, the extraction status will change from “New” to “Modified.” The user can then manually send the updated results to the SFTP server by clicking the “Post” button.

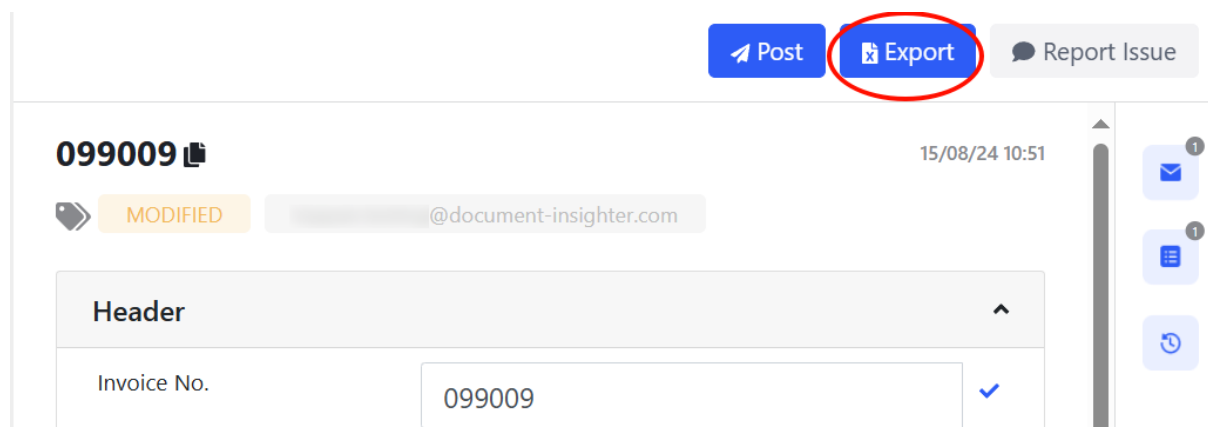


The screenshot shows the top navigation bar with three buttons: 'Post' (blue with a paper plane icon), 'Export' (blue with a document icon), and 'Report Issue' (grey with a speech bubble icon). The 'Post' button is circled in red. Below the navigation bar, the main content area displays '099009' with a document icon, a 'MODIFIED' status tag (circled in red), and a user profile 'j@document-insighter.com'. A 'Header' section is visible, containing an 'Invoice No.' field with the value '099009' and a blue checkmark.

Figure 9: Revise Record

2.3.4 Export Results

Clicking the button  in the following picture will export the extracted results to Excel file(.xlsx).



This screenshot is identical to Figure 9, but the 'Export' button (blue with a document icon) is circled in red instead of the 'Post' button. The rest of the interface, including the '099009' record and the 'Header' section, remains the same.

Figure 10: Export Excel

2.3.5 Issue Report

The system will gather user feedback on extraction issues as follows:

1. Send email directly to support@godeepsite.com for issues like:

- 1 * Cannot access the Insighter web portal
- 2 * Insighter system related question or queries
- 3 * Or other general issues

2. Report issue for a specific extraction of Invoice documents:

- 1 Report issue manually by clicking the “Report ”Issue button. Pick an issue category, like “IPC/”Extraction and leave your comment in the dialog.

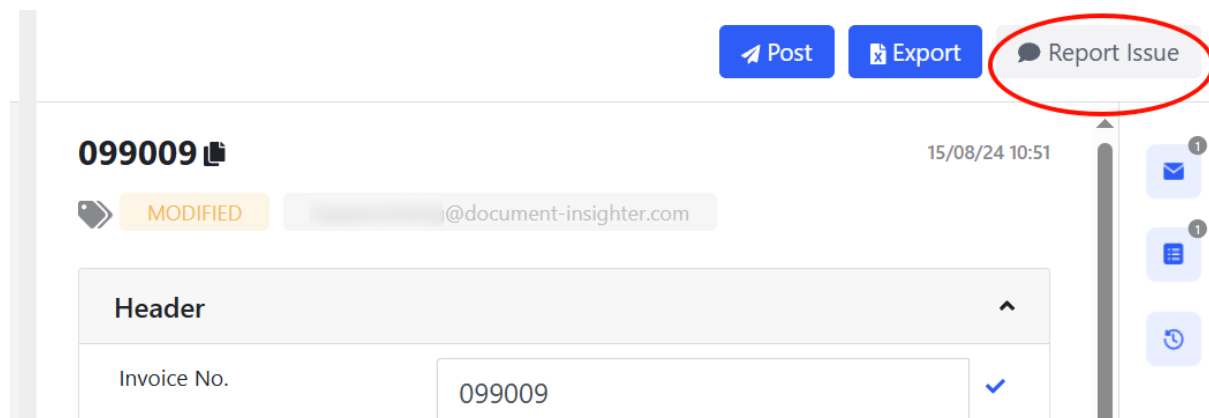


Figure 11: Report Issue Button

3. Users can review the status and details of their reported support cases by clicking button ⓘ to access the “My Support Cases” page.

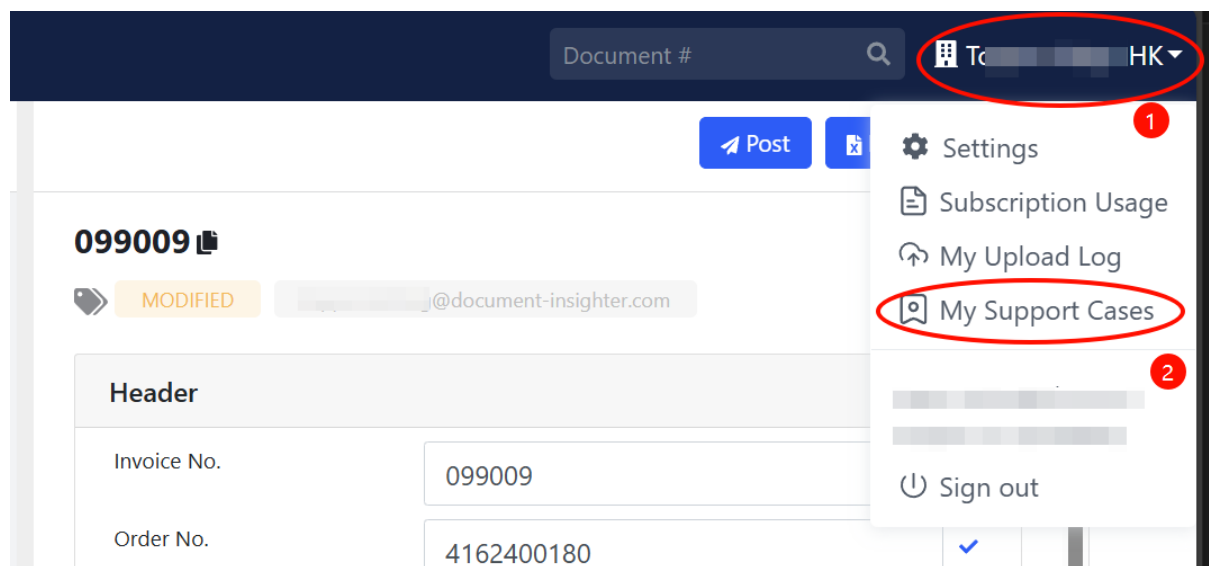


Figure 12: My Support Cases

- 1 * Our Technical Support team will follow up and comment on the support **case** within 5 days.

3 Uploading Documents

3.1 Uploading via Insighter Portal

The system supports users upload Invoice and the certain type of Forms document manually. On the homepage of the Insighter portal, users can click the “Upload” button to manually upload documents:

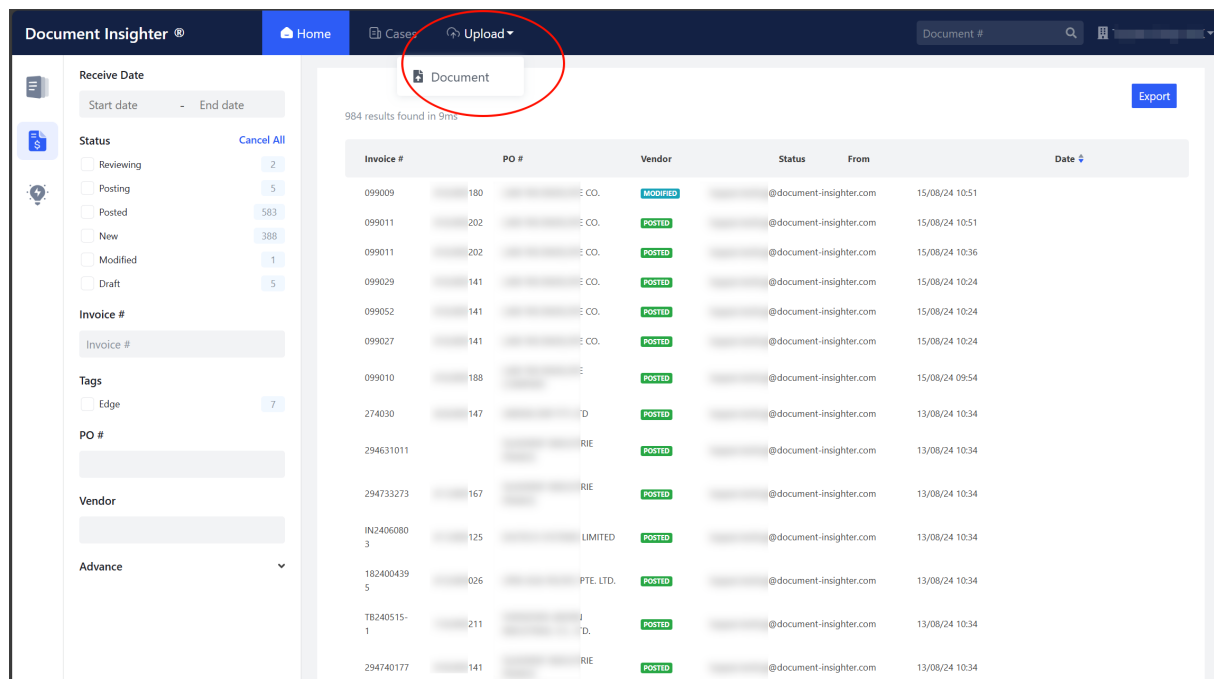


Figure 13: Uploading via Portal

☑ Users need to first select the type of file they want to upload; ☑ Users can also delete the files from the uploading list. ☑ Once the list is ready, click the “Upload” button to complete the uploading process. ☑ Click “My Upload Log” to review all the process status of documents user uploaded. Please note that: • Only PDF files are accepted now. • Users can choose up to 10 documents at once.

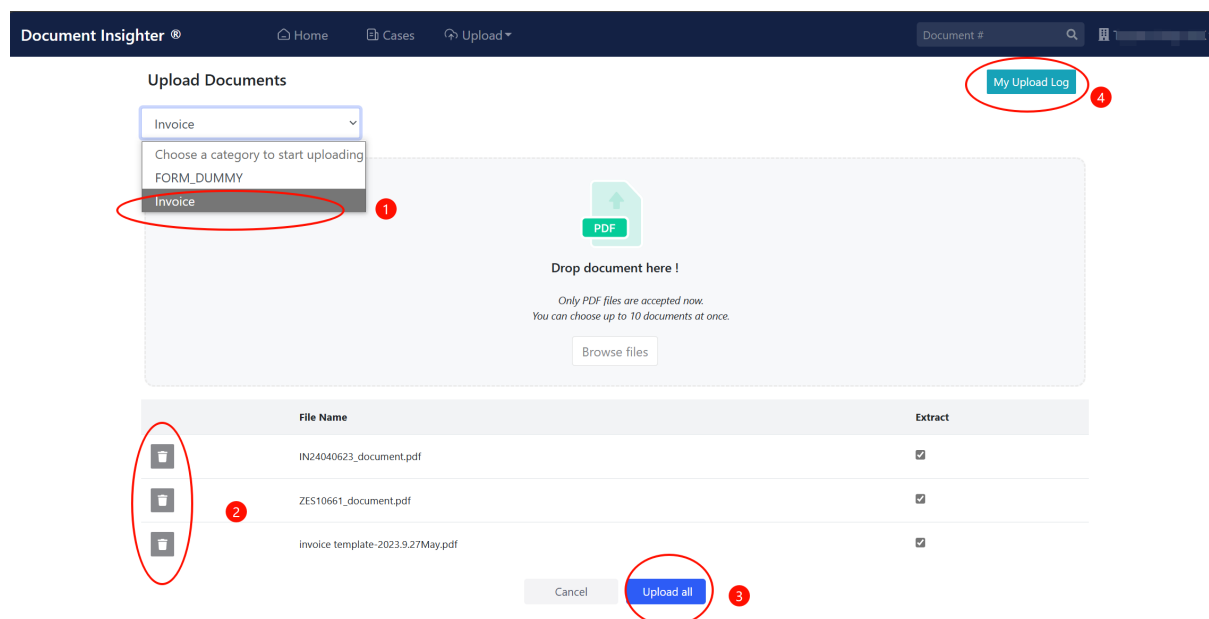


Figure 14: Upload Log

4 Technical Support

Help desk information including responsible technical contact phone numbers for assistance is currently available at the following period.

- Phone Support: 9:30 – 18:00 HKT, Mon to Fri
- Email Support (service desk connected): 24-Hours as per Section 3.3 of this agreement.

5 Appendix

5.1 Email Limitation and Requirements

- Do not send the same Invoice document to the shared mailbox multiple times.
- Please note that our system can read PDF/JPG/PNG/TIF format and the COA documents should be attached directly to the email. The size of one e-mail can't exceed 5MB. Our system is not able to open attached emails and Zip folders.