

INVOICE APPROVAL & INVOICE CAPTURE

Business Central invoice approval, done in Microsoft Teams

Route Purchase Invoices and Credit Memos to the right approvers in Microsoft Teams. With Invoice Capture, supplier invoices emailed or uploaded as PDFs are created for you by AI.

What it does

Purchase Invoices and Credit Memos are submitted for approval from Business Central or created in Cliqo. Your rules route each one to the right people, approvers sign off in Microsoft Teams or by email, and the fully approved document integrates back into Business Central automatically. Invoice Capture is part of Invoice Approval: Azure AI Document Intelligence reads each PDF and creates the Purchase Invoice or Credit Memo, ready for approval.

How it works

- 1 Invoice arrives.** Synced from Business Central, keyed into Cliqo, or emailed or uploaded as a PDF and read by Invoice Capture.
- 2 Rules route it.** Rules on header and line data, budgets and dimensions decide who approves, for example IT-class vendors with a FIN cost centre.
- 3 Approvers sign off.** In Microsoft Teams or by email, without a Business Central licence.
- 4 Business Central updates.** The fully approved invoice or credit memo integrates back automatically.

Key features

- ✓ **Invoice Capture.** AI reads emailed or uploaded invoices and credit notes and creates the document for you.
- ✓ **Rules on line details.** Route each line by its dimensions, amounts and budgets, with your own vendor and G/L account groupings.
- ✓ **Easy to use.** Build rules in minutes, drag them into order and test them before going live. No more fighting with Business Central workflows.



Lands in Business Central as

Purchase Invoices	approved, or created by Invoice Capture
Credit Memos	approved, or created by Invoice Capture

Built for

- ✓ Accounts payable teams processing supplier invoices at volume
- ✓ Budget holders who approve but don't need Business Central
- ✓ Multi-company and multi-currency estates

The Cliqo Workflow Engine

Shared by every module. Set your rules up once and use them everywhere.

Easy to use Rules on line details

Drag-and-drop ordering Test mode

Full app in Teams

No BC licence for approvers

Entra ID users Multi-company

See Cliqo with your own scenarios

Book a 30-minute demo, or start with one free sandbox environment.

cliqo.co.uk/book-a-demo