AutoSOA

Receipt Scanning (AI): your onboarding guide

Built 2026-11-02 from the course's final takes.

How to use this guide: watch the lesson, then do the same with this page open.

Lesson map

#	Lesson	Who	Min	At the end you will have
01	How scanned receipts come in	admin	2	Ben may scan receipts; every receipt waits for a person (Check every receipt on); corrections learned after 2; Office supplies for scanned receipts
02	Scan a receipt	staff	3	receipt 0458 checked line by line, Rizal Paper Supply added from it, posted as an expense
03	Scan a receipt with Guide me	staff	2	receipt 0471 scanned through Guide me and posted the same way
04	What if AutoSOA reads a receipt wrong?	staff	2	receipt 0486 comes back filled in from the two corrections, and is posted

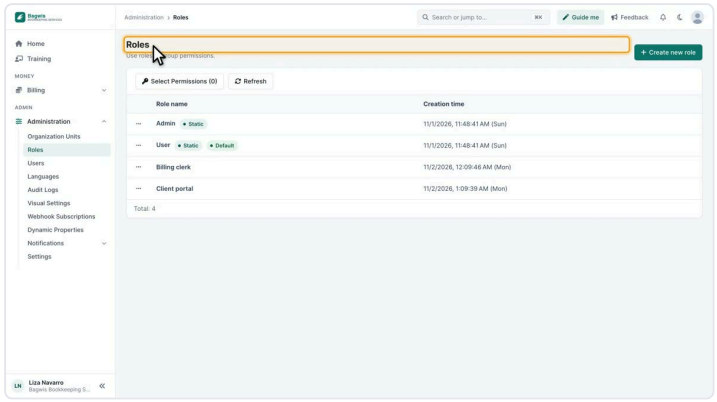
Lesson 01 · admin · 2 min · `receipts-onboard-01.webm`

How scanned receipts come in

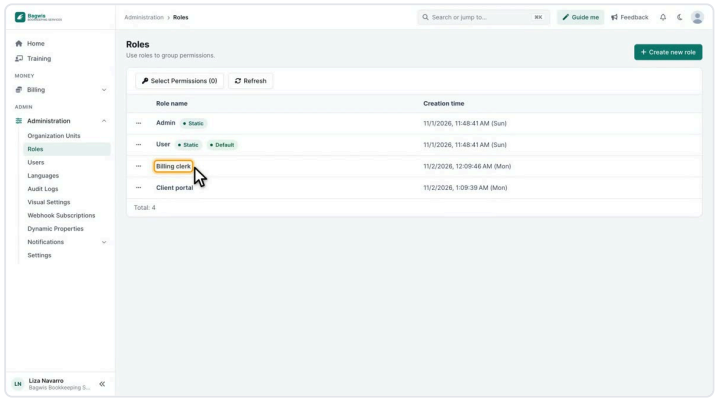
> **At the end you will have:** Ben may scan receipts; every receipt waits for a person (Check every receipt on); corrections learned after 2; Office supplies for scanned receipts

> **Before you start:** Bagwis has just added Receipt Scanning. You need the expense categories from lesson eighteen of the Billing course.

1 **Open Administration, then Roles.**

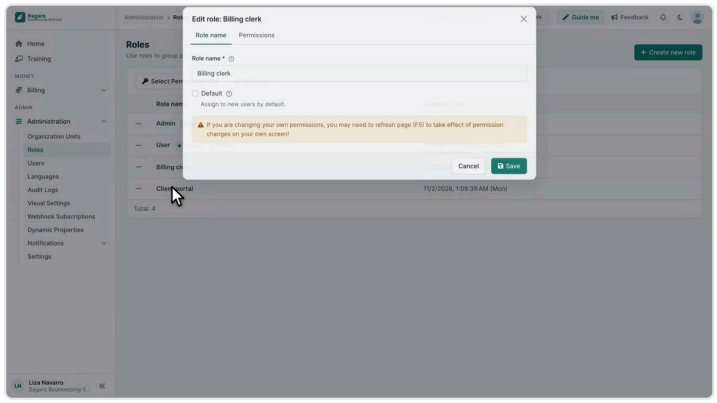


Here are your roles.

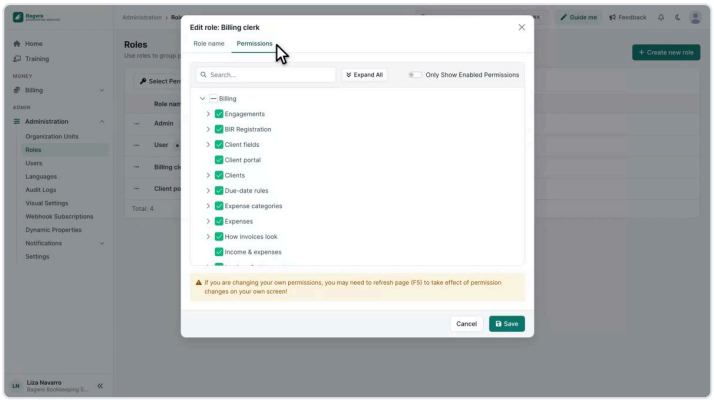


Billing clerk is the role you gave Ben in lesson two of the Billing course.

2 **On Billing clerk, click the row's menu (⋯), then click Edit.**

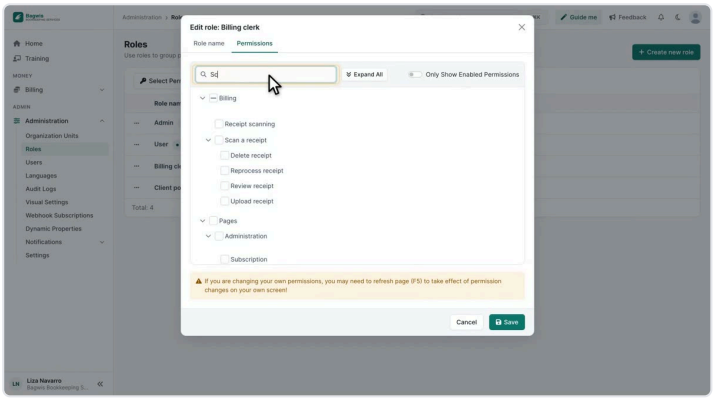


3 **Click Permissions.**

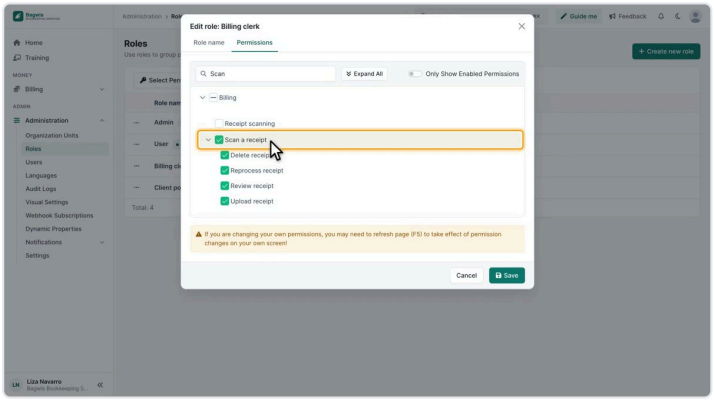


4 Ben scans the receipts. You keep the rules for them.

Type Scan in the search box.

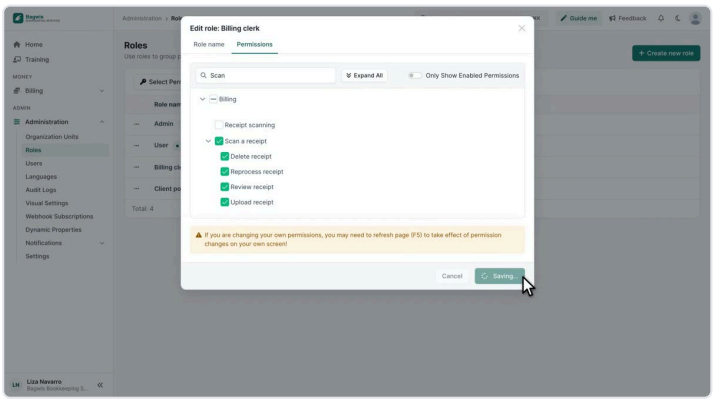


5 **Turn on Scan a receipt.**



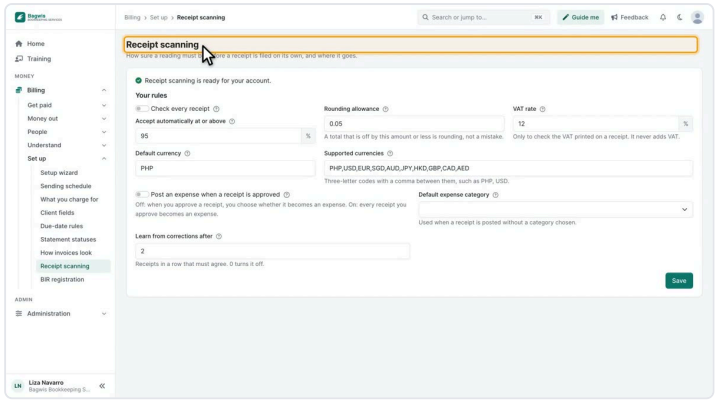
Scan a receipt is on. **Receipt scanning**, with its rules, stays off for Ben.

6 **Click Save.**

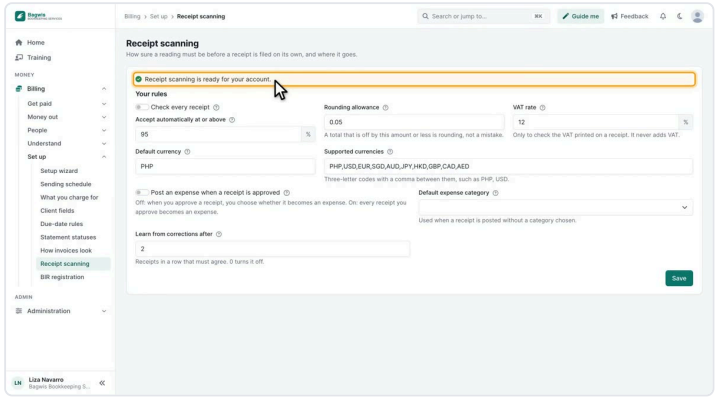


7

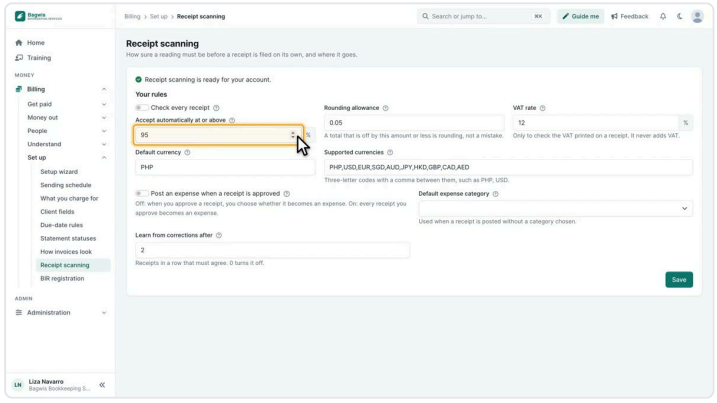
Next, receipt scanning. Open Billing, then Set up, then Receipt scanning.



This is **Receipt scanning**. AutoSOA reads a photo of a receipt, and fills in the expense for you.



It says receipt scanning is ready for your account.

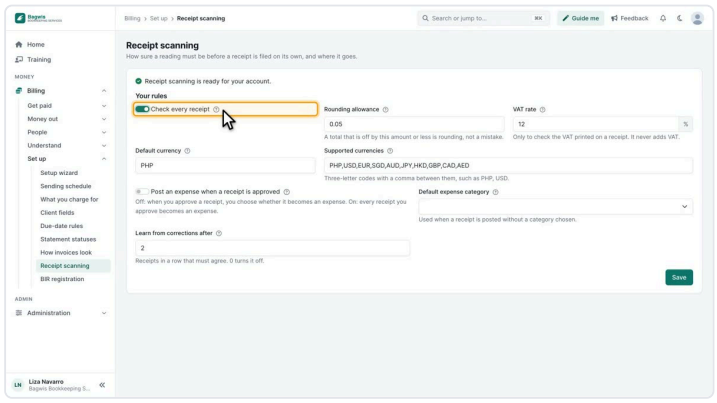


Accept automatically at or above shows ninety-five percent. AutoSOA accepts a receipt it is that sure of, without a check.

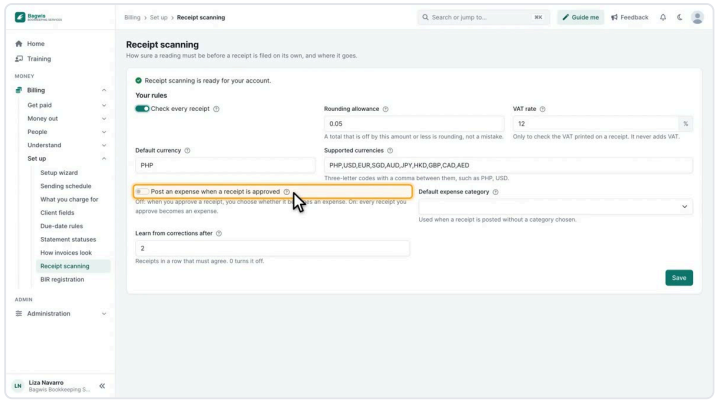
8

Bagwis checks every receipt before it becomes an expense.

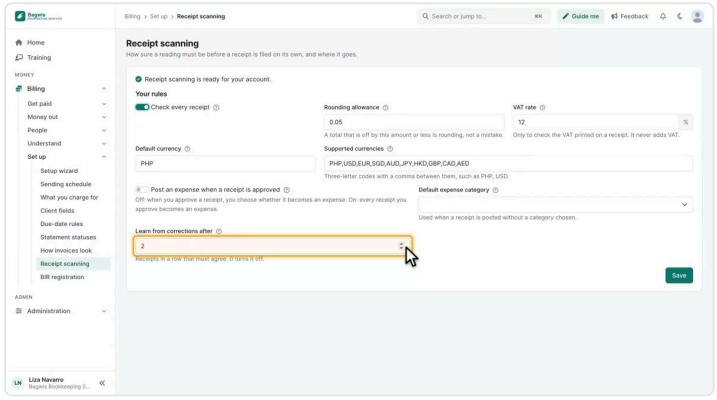
Turn on Check every receipt.



Accept automatically at or above is gone. AutoSOA accepts nothing by itself now, so every receipt waits for you.



Post an expense when a receipt is approved stays off. You post each receipt yourself.

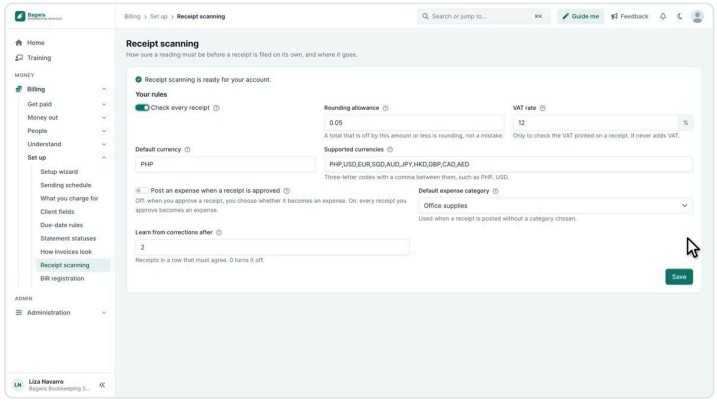


Learn from corrections after shows 2. After two receipts from one supplier are posted the same way, AutoSOA fills in the next one for you. Keep it.

9

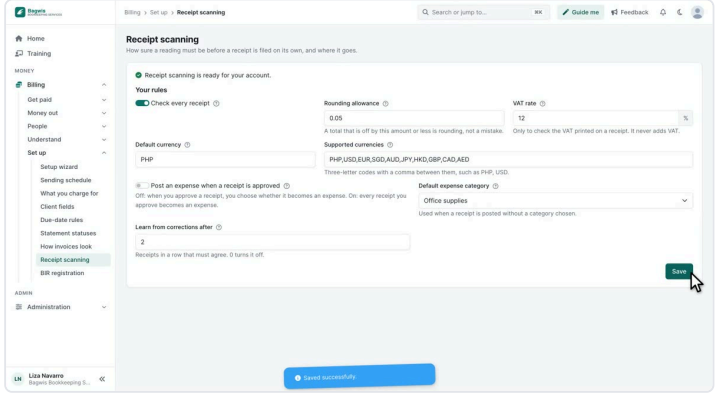
A scanned receipt goes into one category, unless you choose another.

Choose Office supplies in Default expense category.

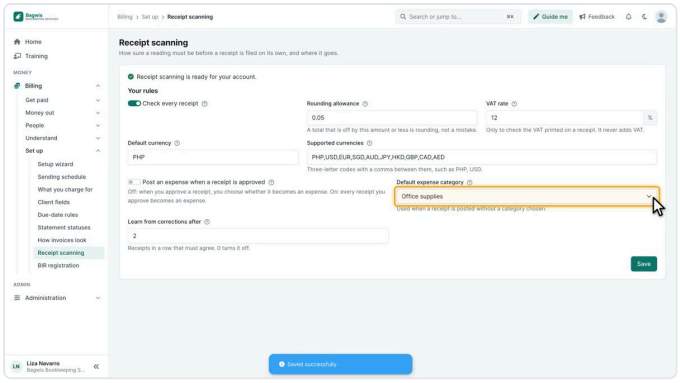


10

Click Save.



Check



Office supplies is the category for scanned receipts, and every receipt waits for you.

Ben can scan receipts. Every receipt waits for a person, and goes under Office supplies. Next, Ben scans his first receipt.

Check yourself

How do you let the billing clerk scan receipts?

How do you make every scanned receipt wait for a person?

Where do you choose the category for scanned receipts?

What does Learn from corrections after do?

Common mistakes

The screen says	What to do
Receipt scanning says scanning is not switched on for your account yet.	Email admin@autosoa.com to switch it on. It is a server setting, not one of yours.

Lesson 02 · staff · 3 min · `receipts-onboard-02.webm`

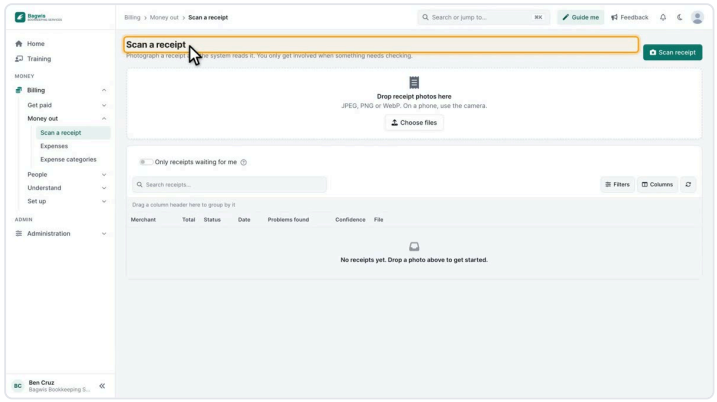
Scan a receipt

> **At the end you will have:** receipt 0458 checked line by line, Rizal Paper Supply added from it, posted as an expense

> **Before you start:** You need the settings from lesson one, and the Office supplies category from lesson eighteen of the Billing course.

1

Open Billing, then Money out, then Scan a receipt.



This is **Scan a receipt**. Here, AutoSOA reads a photo of a receipt for you.

2

Bagwis bought office supplies from Rizal Paper Supply, and paid cash.

Click Scan receipt, then choose the photo of the receipt.

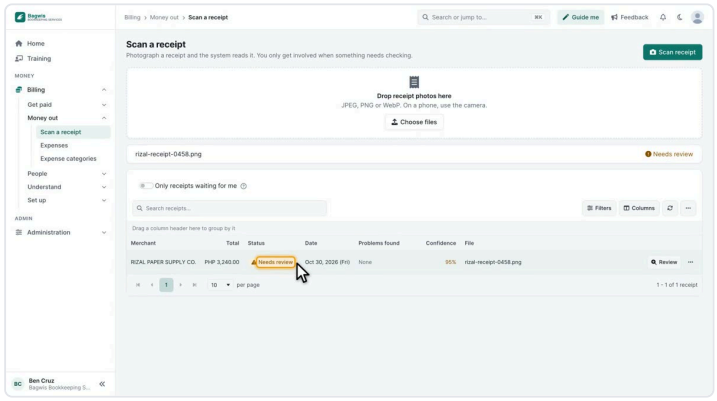
AutoSOA reads the photo now. It takes a little while.

It reads the supplier, the TIN, the date, each item, the VAT and the total.

Then it checks that the figures add up.

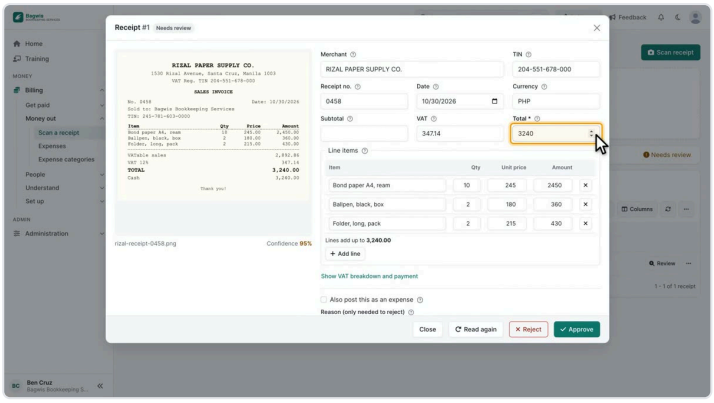
Bagwis checks every receipt before it counts. A wrong figure would go on the BIR's Summary List of Purchases.

Each line you check here becomes a line of the expense.



It shows **Needs review**, because Bagwis checks every receipt.

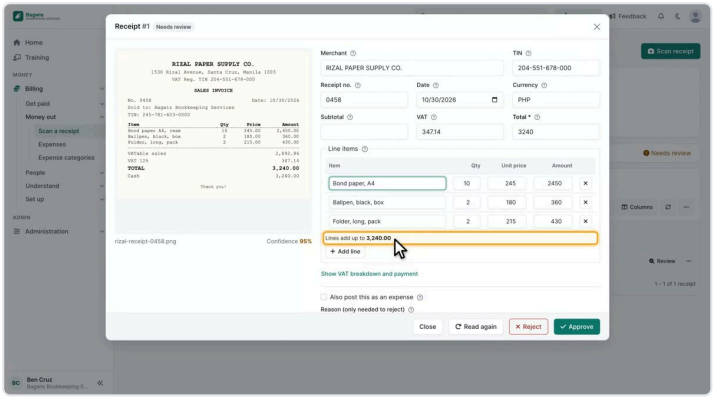
3 **Click Review.**



Check each figure against the photo: the total, the VAT and the supplier's TIN.

4 **Line items** shows each line as it was read: what was bought, how many, and the price.

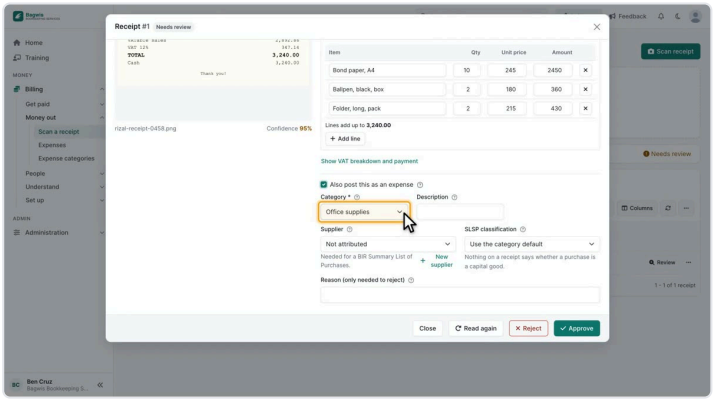
Bagwis calls the paper Bond paper, A4. Type that in the paper's line, in Item.



Lines add up to shows their total. Check it against the receipt.

5 An approved receipt becomes an expense only if you say so.

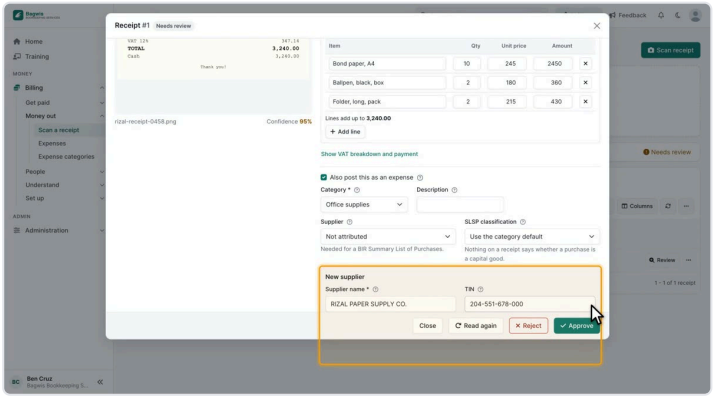
Turn on Also post this as an expense.



Category shows **Office supplies**, the one you set in lesson one.

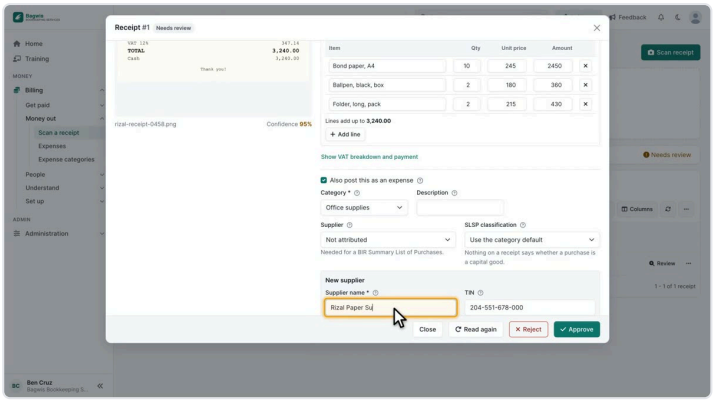
6 Rizal Paper Supply is not one of your suppliers yet. The receipt has its name and TIN.

Click New supplier.

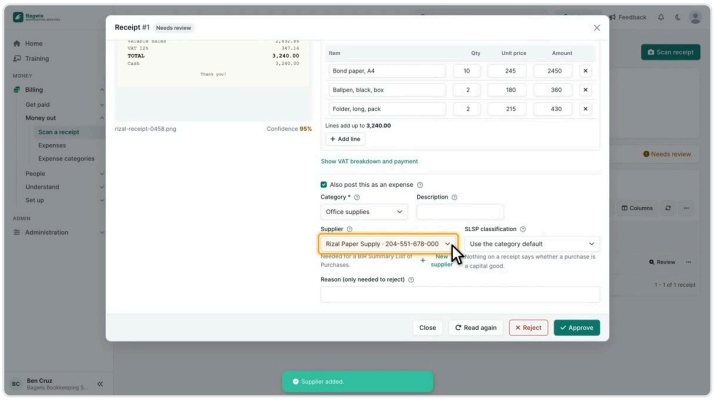


The **New supplier** panel opens. The name and the TIN come from the receipt.

7 **Type Rizal Paper Supply in Supplier name, as you call them.**



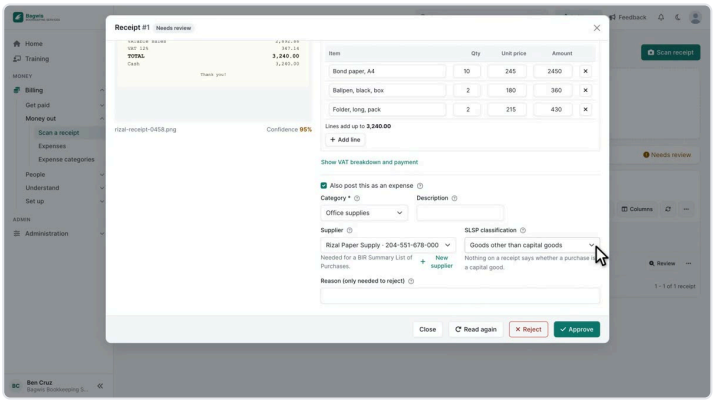
8 **Click Save supplier.**



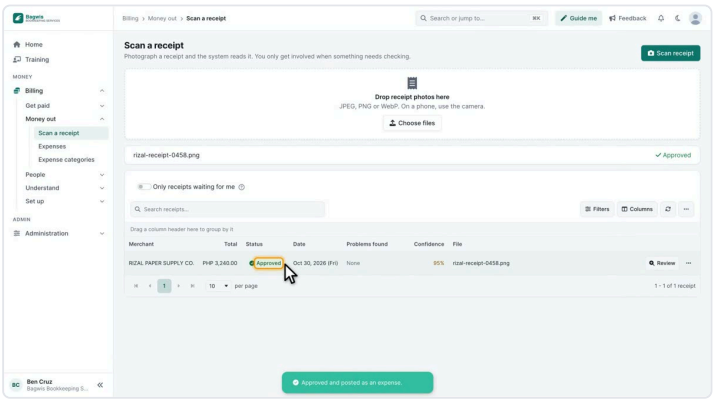
Supplier shows Rizal Paper Supply.

9 **SLSP classification** is how the BIR lists this purchase. Paper and pens are goods.

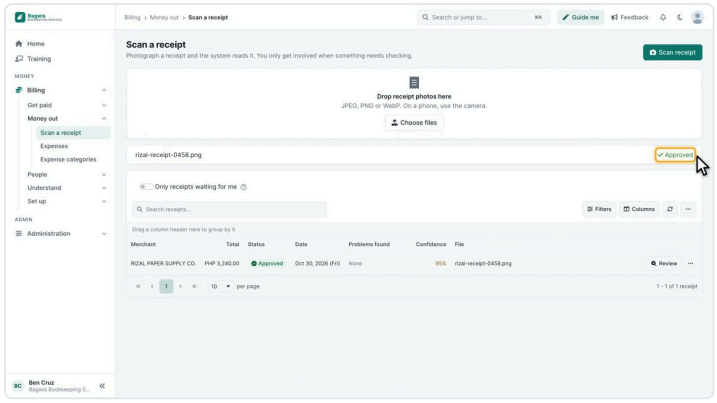
Choose Goods other than capital goods in SLSP classification.



10 **Click Approve.**

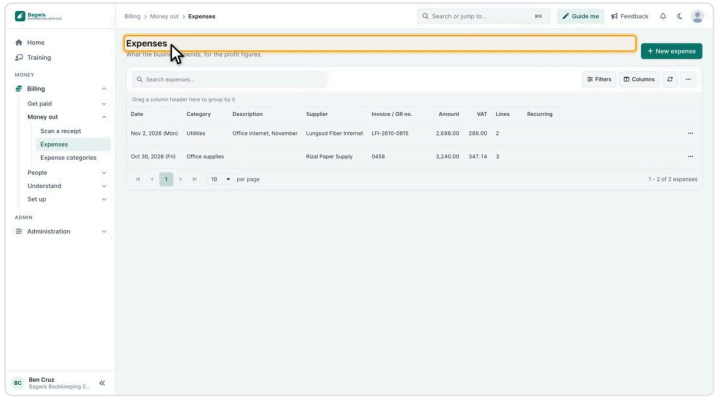


The receipt shows **Approved**.



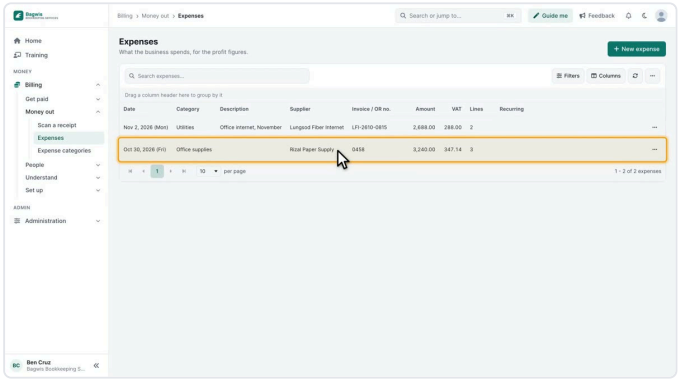
Above the list, the photo now says **Approved** too.

11 **Now open Money out, then Expenses.**



This is **Expenses**: every expense Bagwis has entered.

Check



Here is the receipt in **Expenses**, with its VAT. **Supplier** shows Rizal Paper Supply.

Ben scanned a receipt, corrected a line, added the supplier, and posted it as an expense. Next, Ben scans a receipt with Guide me.

Check yourself

Where do you scan a receipt photo?

How does a scanned receipt become an expense?

The supplier on a receipt is not in your list. What do you do?

Common mistakes

The screen says	What to do
No line items were read from this receipt.	If the picture lists items, click **Add line** and type the ones that matter. The lines are optional.
A receipt shows "Approved automatically", and it is not in **Expenses**.	Click **Review**, then click **Post as expense**. To check every receipt yourself, turn on **Check every receipt** on **Receipt scanning** (lesson one).

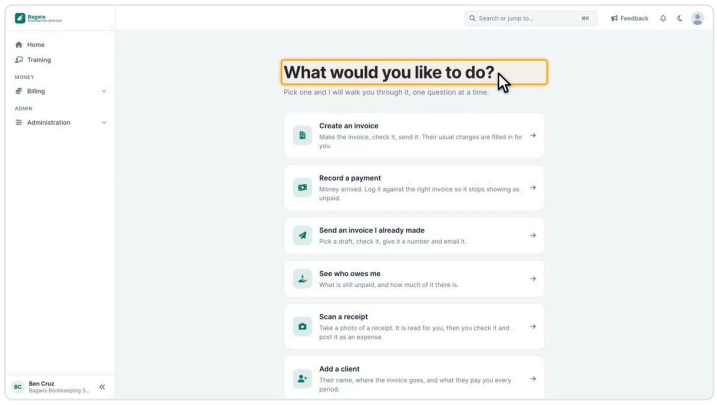
Lesson 03 · staff · 2 min · `receipts-onboard-03.webm`

Scan a receipt with Guide me

> **At the end you will have:** receipt 0471 scanned through Guide me and posted the same way

> **Before you start:** You need lesson two: how a receipt is checked and posted, and Rizal Paper Supply as a supplier.

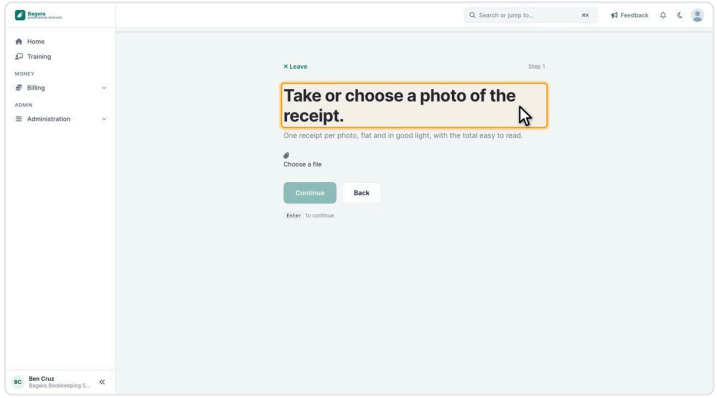
1 **Click Guide me, at the top of the page.**



Guide me asks **What would you like to do?** Each card is one task.

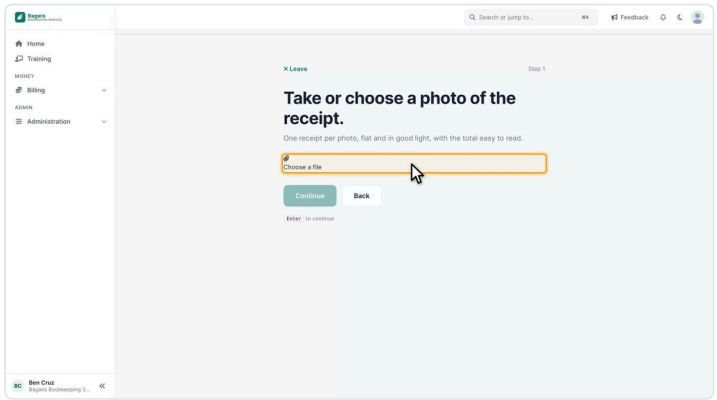
2 Ben has another receipt from Rizal Paper Supply: printer ink and sticky notes.

Click Scan a receipt.



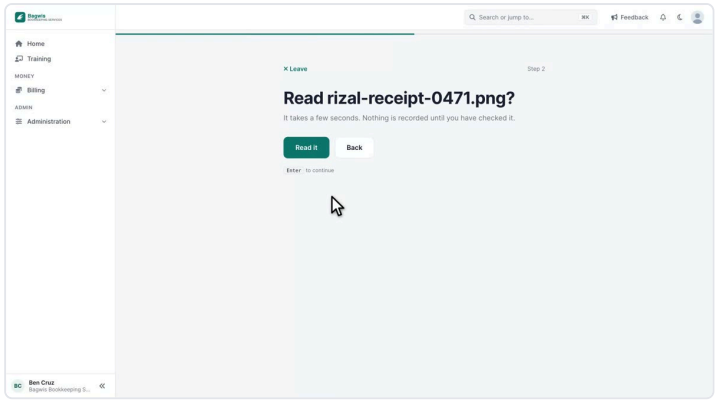
It asks: **Take or choose a photo of the receipt.**

3 **Click Choose a file, then choose the photo.**



4

Click **Continue**.



5

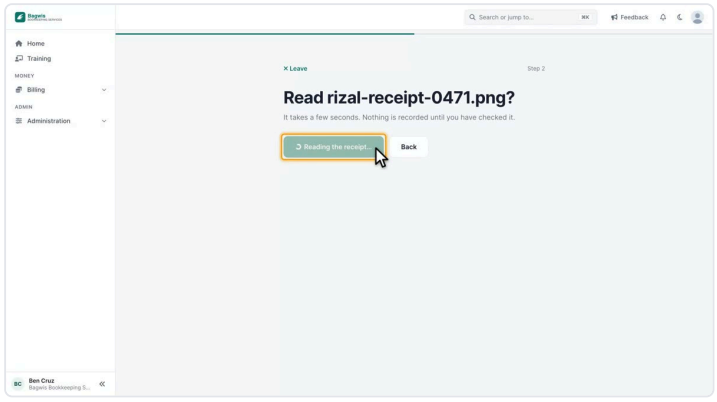
Click **Read it**.

It reads the supplier, the TIN, the date, each item, the VAT and the total.

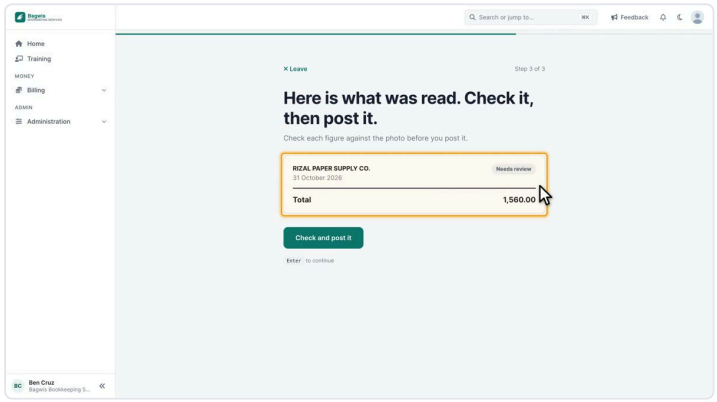
Then it checks that the figures add up.

Bagwis checks every receipt before it counts. A wrong figure would go on the BIR's Summary List of Purchases.

Each line you check here becomes a line of the expense.



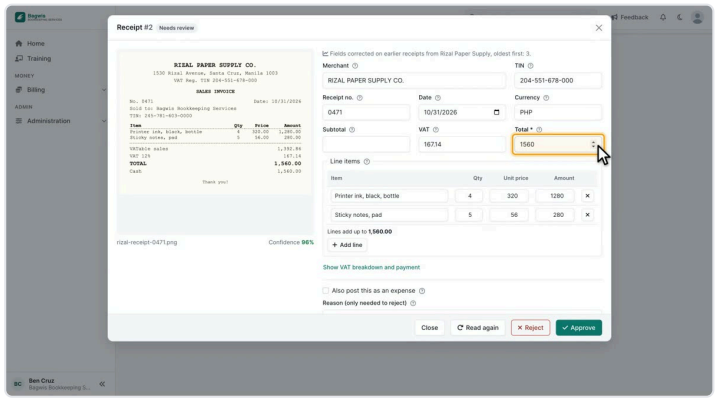
The button says **Reading the receipt…**



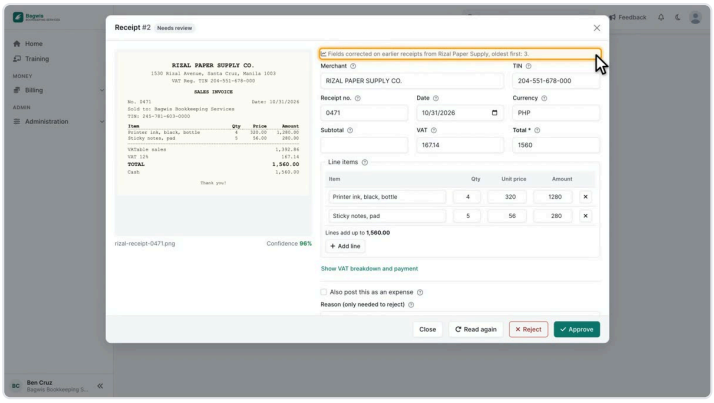
Here is what was read. Guide me shows the supplier and the total.

6

Click **Check and post it**.

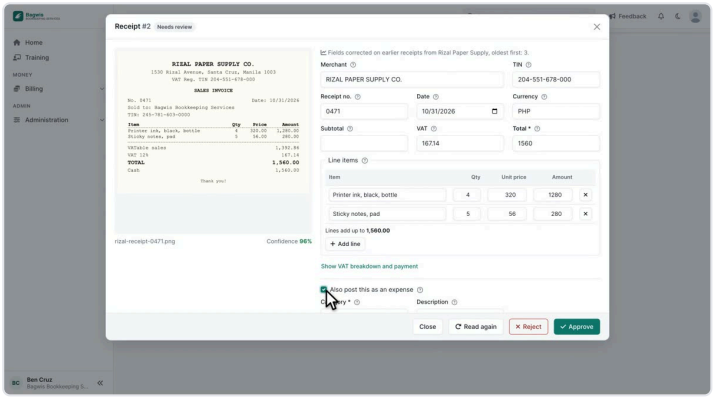


The receipt's own review opens, as in lesson two. Check it against the photo.



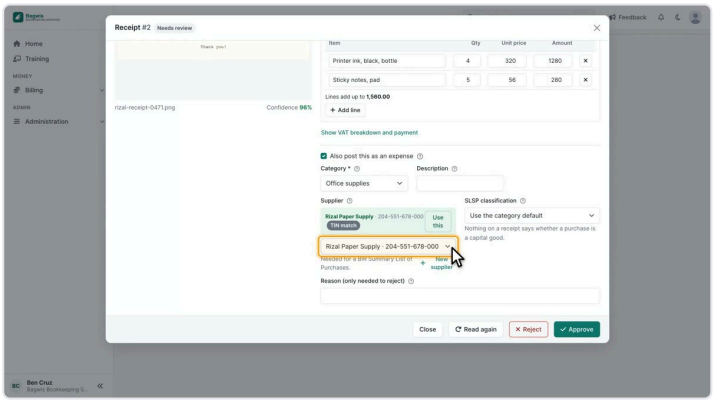
This line counts the fields Ben corrected on the first receipt from Rizal Paper Supply. The count shows how well AutoSOA reads this supplier.

7 **Turn on Also post this as an expense.**



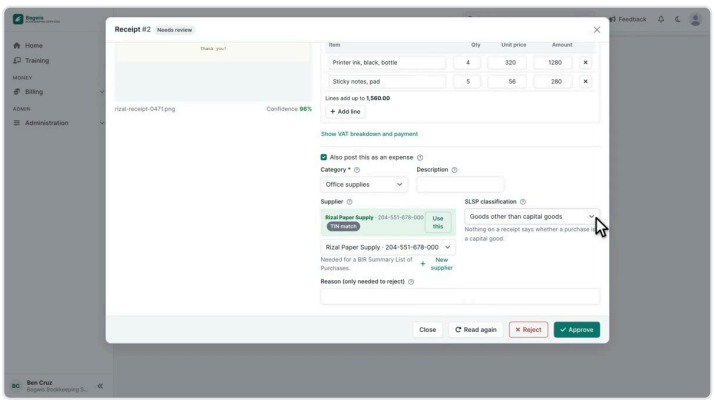
8 AutoSOA matched the TIN on this receipt to Rizal Paper Supply. It suggests that supplier here.

Click Use this.

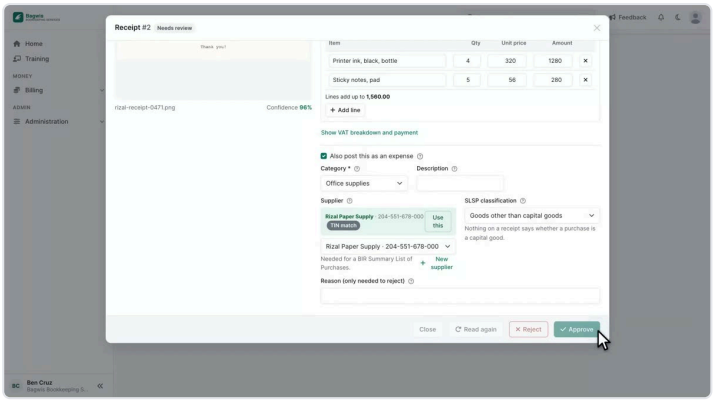


Supplier shows Rizal Paper Supply.

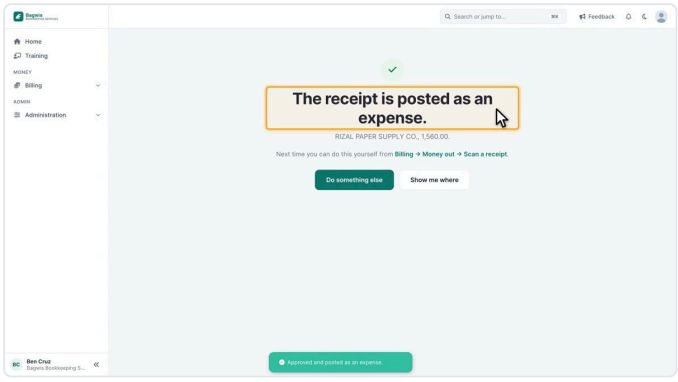
9 **Choose Goods other than capital goods in SLSP classification, as last time.**



10 **Click Approve.**

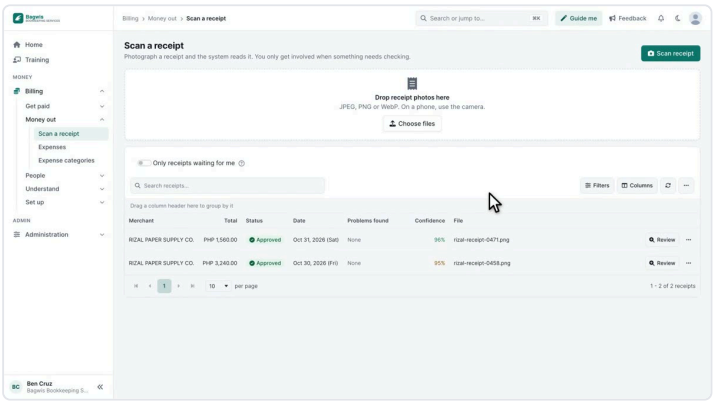


What changed



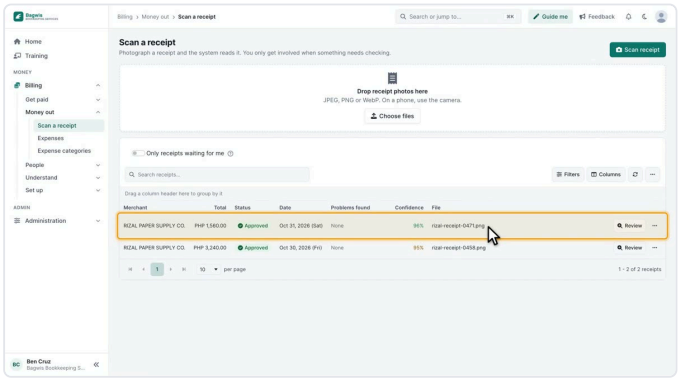
The receipt is posted as an expense.

11 **Click Show me where.**



Guide me opens Scan a receipt, where this task lives.

Check



Here is the receipt, **Approved**.

Guide me took Ben from the photo to the review. He posted it the same way as the first one. Next: what if AutoSOA reads a receipt wrong?

Check yourself

Where is Guide me?

Where do you check a receipt that Guide me has read?

Common mistakes

The screen says	What to do
The receipt is still being read.	Open **Scan a receipt** in a minute, and click **Review** on it.

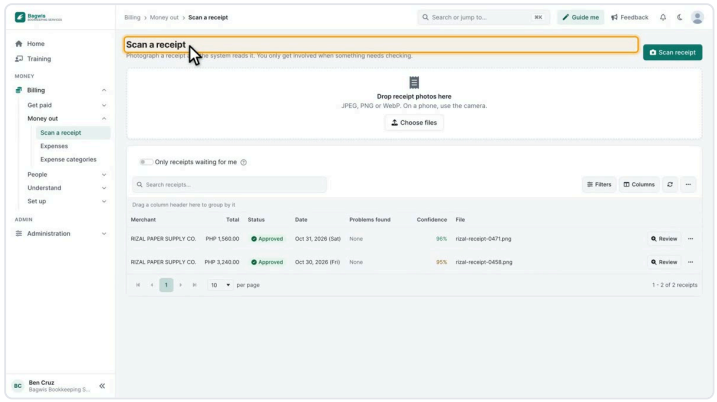
Lesson 04 · staff · 2 min · `receipts-onboard-04.webm`

What if AutoSOA reads a receipt wrong?

> **At the end you will have:** receipt 0486 comes back filled in from the two corrections, and is posted

> **Before you start:** You need lessons two and three: two receipts from Rizal Paper Supply, posted the same way.

1 **Open Billing, then Money out, then Scan a receipt.**



Here are the receipts Ben has scanned.

2 Rizal Paper Supply sent a third receipt: more paper, and staple wire.

Click Scan receipt, then choose the photo of the receipt.

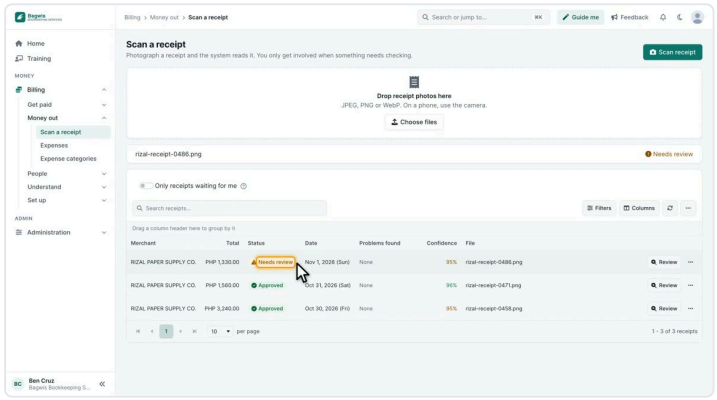
AutoSOA reads the photo now. It takes a little while.

It reads the supplier, the TIN, the date, each item, the VAT and the total.

Then it checks that the figures add up.

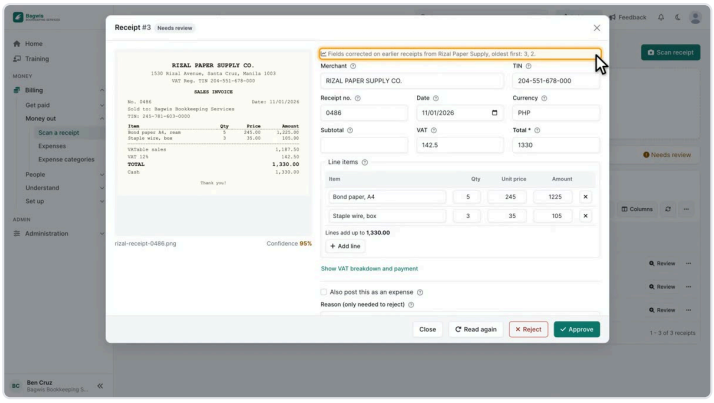
Bagwis checks every receipt before it counts. A wrong figure would go on the BIR's Summary List of Purchases.

Each line you check here becomes a line of the expense.

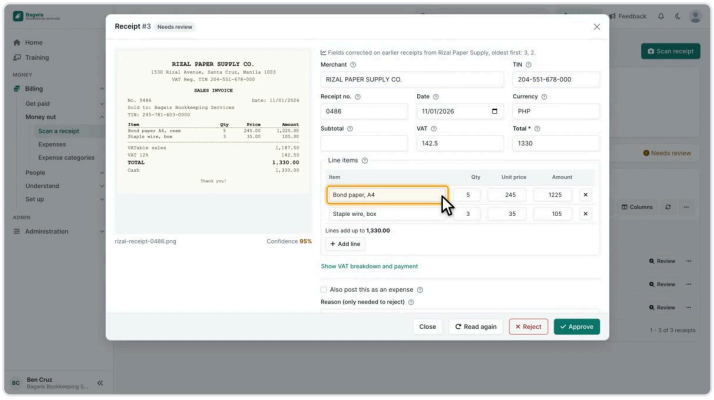


It shows **Needs review**, because Bagwis checks every receipt.

3 **Click Review.**

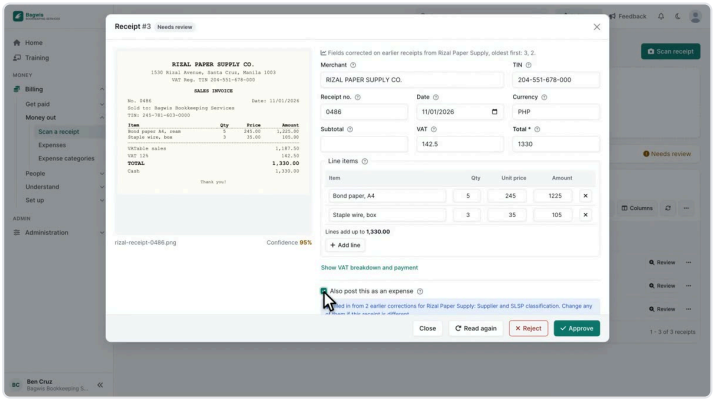


This line now counts both earlier receipts from Rizal Paper Supply, oldest first. Ben corrected fewer fields on the second one.

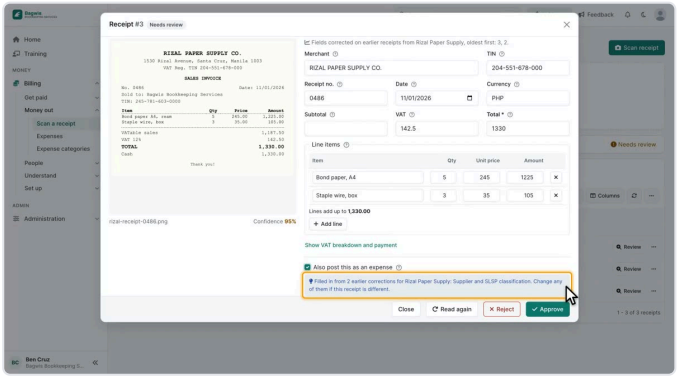


Line 1 already reads Bond paper, A4. AutoSOA used the name Ben gave this item on the first receipt.

4 **Turn on Also post this as an expense.**

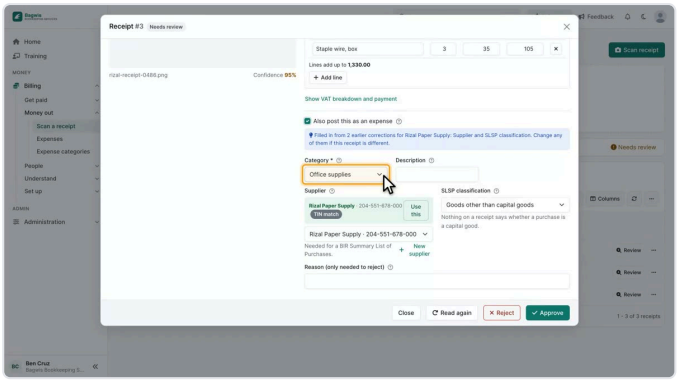


What changed



A note says **Supplier** and **SLSP classification** are filled in from two earlier corrections.

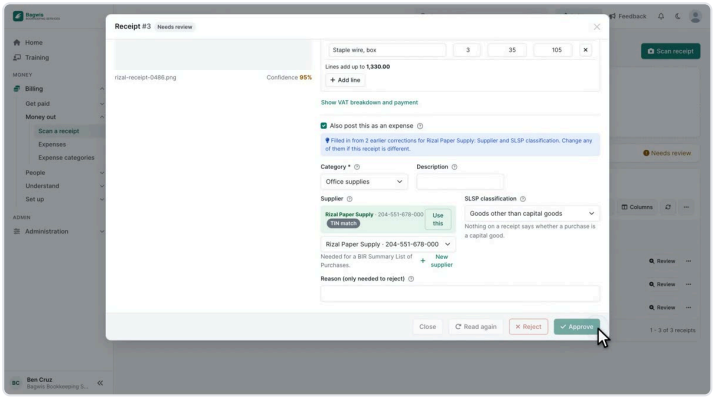
What changed



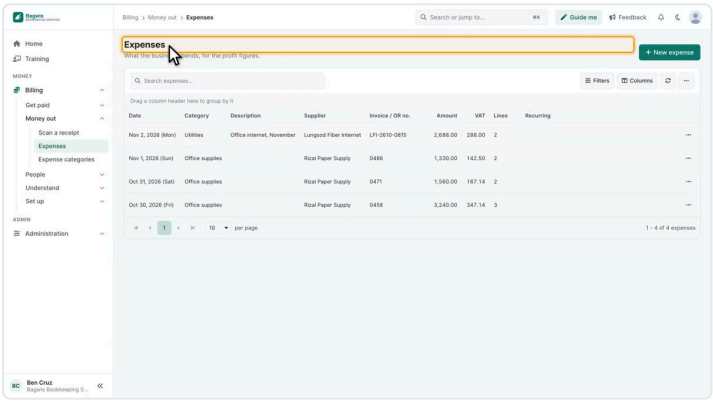
Category shows **Office supplies**, your default for scanned receipts. There was nothing to learn there.

5 Check them anyway. Change any of them if this receipt is different.

They are right. Click Approve.

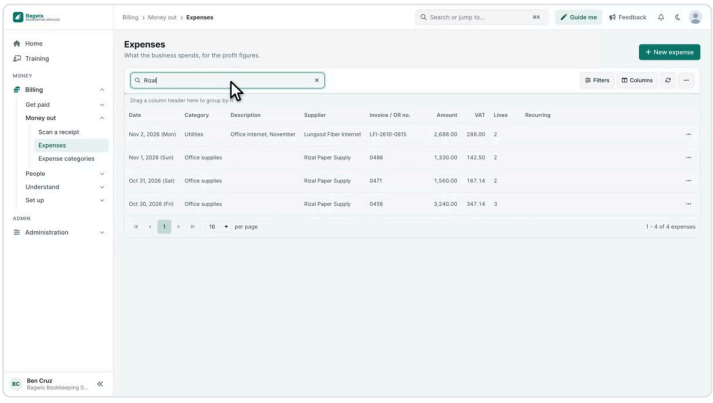


6 **Open Money out, then Expenses.**

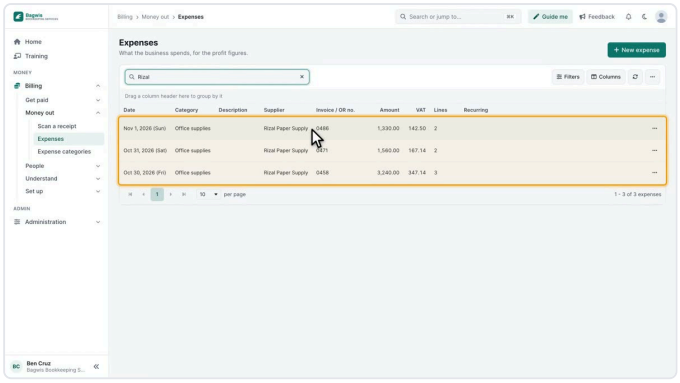


This is Expenses: every expense Bagwis has entered.

7 **Type Rizal in the search box.**



Check



All three receipts from Rizal Paper Supply are here, posted the same way.

> **The rule to remember:** The rule: correct what was read wrong before you post. After two receipts posted the same way, AutoSOA fills in the next one for you.

Ben corrected the first receipts. On the third, AutoSOA used his choices and his name for the paper. That is the end of the Receipt Scanning course. Bagwis checks every receipt, and AutoSOA gets better with each correction.

Check yourself

When does AutoSOA fill in a receipt for you?

How do you know a field was filled in from your corrections?

Common mistakes

The screen says	What to do
Filled in from … earlier corrections, but this receipt is different.	Change the field before you click **Approve**. The note says so: change any of them if this receipt is different.

Cheat sheet

When	Task	Where	Lesson
Every day	Scan a receipt, check it, post it	Money out › **Scan a receipt** › **Review**, or **Guide me** › **Scan a receipt**	02, 03
A new supplier on a receipt	Add it from the receipt	The review › **New supplier**	02
A receipt is read wrong	Correct it before you post; AutoSOA learns	The review	04
To check every receipt yourself	Turn on **Check every receipt**	Set up › **Receipt scanning**	01

Glossary

Term	What it means for your business	Where you see it
Receipt scanning	AutoSOA reads a photo of a receipt and fills in the expense.	Billing › Set up › Receipt scanning (01); Billing › Money out › Scan a receipt (02)
Scan a receipt	Ben's permission to scan, and the page where he does it.	Roles › Permissions (01); Billing › Money out (02, 04)
Accept automatically at or above	How sure AutoSOA must be to accept a receipt without a person. Hidden while Check every receipt is on.	Receipt scanning (01)
Check every receipt	When on, every scanned receipt waits for a person to check it; AutoSOA accepts none by itself.	Receipt scanning (01)
Learn from corrections after	How many receipts from one supplier, posted with the same supplier, category and SLSP classification, before the next one is filled in with them. 0 turns it off.	Receipt scanning (01)
Needs review	A scanned receipt waiting for a person to check it against the photo.	Scan a receipt › Review (02, 04)
Line items, Lines add up to	What the receipt lists, line by line, as it was read; correct, add or remove a line. Their total.	The receipt's review (02)
New supplier	Adds the receipt's supplier, with the name, TIN and address read from it.	The receipt's review, under Supplier (02)
SLSP classification	How the BIR lists the purchase: goods, services or capital goods.	The receipt's review (02, 03)
Also post this as an expense	Makes the approved receipt an expense.	The receipt's review (02, 03, 04)
Reading the receipt…	Guide me is reading the photo.	Guide me › Scan a receipt (03)
Filled in from 2 earlier corrections	The note that says which fields came from your earlier choices for this supplier.	The receipt's review (04)
Fields corrected on earlier receipts	How many fields you changed on each earlier receipt from the supplier, oldest first.	The receipt's review (04)

Go-live checklist

Step	Who	Done
Turn on Receipt Scanning for the client's account (Host › Tenants › Modules), then restart the API	AutoSOA (implementer)	☐
Check the server's receipt reading service and file storage are set (host settings)	AutoSOA (implementer)	☐
Run the production grants the release notes list for Receipt Scanning	AutoSOA (the user runs these)	☐
Return the questionnaire	Client (owner)	☐
Let the clerk scan receipts, and set the rules (lesson 01)	Client (owner)	☐
Scan and post the first receipts with the implementer watching (lessons 02–03)	Client (clerk)	☐
Sign-off: the first receipts are expenses, with their suppliers	Client and AutoSOA	☐

Getting help

- Email **admin@autosoa.com** with your business name, the screen you were on and what it said.
- Guide me, at the top of every page, walks you through scanning a receipt.