# Process your first invoice

Add one invoice, check what Fluxity captured, and send it to your ERP as a draft bill.

Last verified September 16, 2026

## What you'll do

Take one invoice from start to finish: add it, check what Fluxity read, and push it to your ERP. By the end you will have a draft bill waiting for approval in your accounting system, and you will know where every step lives.

## Before you start

- You can sign in to Fluxity.
- Your ERP is connected. Your administrator sets this up once, so if you are not sure, ask them.
- You have one invoice as a PDF, JPG, or PNG.

## Add the invoice

There are two ways to get an invoice in. Use whichever is easier.

1. **Upload it.** Drag the file onto the **Documents** page, or use the upload button and pick it from your computer.
2. **Forward it.** Send the invoice to your team's Fluxity inbox address. Anything that arrives there is picked up automatically. Your administrator can tell you the address.

The invoice appears in your **Documents** list right away.

# Check what Fluxity captured

1. Watch the document move from **Processing** to **Matched**. If something needs your eyes, it lands in **Needs attention** instead.
2. Click the row to open it.
3. On the **Extraction** tab, confirm the vendor, invoice number, dates, and totals match the invoice in front of you. Anything Fluxity was unsure about is marked for you to confirm or correct.
4. On the **GL/Vendor Matching** tab, check the vendor, the purchase order it linked (if there is one), and the account coding on each line.

> NOTE
> You do not have to fix everything by hand. Fluxity fills in what it is confident about and only asks you about the rest.

# Send it to your ERP

When the document looks right, click **Push to ERP**. Fluxity creates the bill in your accounting system as a draft, with the original invoice attached, so someone can give it a final approval before it posts.

# What happens next

The draft bill is now in your ERP, ready for your normal approval step. Back in Fluxity, the document's **Timeline** records what happened and when, so you always have a trail.

# If you get stuck

- Nothing to review? Open the **Needs attention** view to see only the documents waiting on you.
- The **Push to ERP** button is missing, or you see a **Push blocked** message? See Why can't I push?.

- A line has the wrong amount or account? See Correct line items and GL coding.

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Online version: https://fluxity.ai/help/users/process-your-first-invoice
Last verified September 16, 2026. The online version is always the most current.