



Fluxity User Guide

Step-by-step guides for everyday work in Fluxity.

<https://fluxity.ai/help>

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How Fluxity works

Understand what happens to an invoice between the moment it arrives and the moment it lands in your ERP.

What Fluxity does with an invoice

- 1. Reads it.** Fluxity captures the vendor, invoice number, dates, totals, and every line item from the PDF or image.
- 2. Checks it.** It looks up the vendor in your ERP, finds the matching purchase order when there is one, and proposes GL accounts and other coding.
- 3. Waits for you when it needs to.** Anything it is not sure about is flagged for review. You confirm or correct it.
- 4. Sends it.** When the invoice is ready, it is pushed into your ERP as a vendor bill.

What you do

Most days you will open the **Documents** list, look at anything marked as needing review, fix what is wrong, and push.

NOTE

The Help Center is an early preview. Ready to try it? Start with [Process your first invoice](#). More task guides are being added.

Process your first invoice

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

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](#).

Correct line items and GL coding

Check the account on each line, accept the suggestions you trust, and fix the ones you don't, before you push.

What you'll do

Make sure every line on an invoice has the right amount and the right general ledger account before it reaches your ERP. This is the step that keeps bad coding out of your books.

Before you start

- Open the document you want to check from the **Documents** list.
- Go to the **GL/Vendor Matching** tab.

Review the coding

1. Each line shows a suggested account as a chip. Read down the list and confirm the suggestions make sense for this vendor.
2. To see why a value was chosen, click the **why** icon next to it. Fluxity shows where the value came from, such as a matched purchase order, one of your rules, or how this vendor is usually coded.
3. When a line has no good suggestion, pick the account yourself from the list.

Accept the ones you trust

If several lines have confident suggestions, use the **Accept GL** button to apply them all at once. It tells you how many it applied and how many it left for you to review line by line. When nothing is confident enough, the button does not appear, so you are never nudged to bulk-apply a weak guess.

Fix what's wrong

- **Wrong account.** Pick the correct GL or analytic account from the list on that line. Accounts are changed by choosing the right one here, not by clearing them.
- **Wrong amount.** Switch to the **Extraction** tab and correct the amount there. Fluxity rechecks the math after you save.
- **A classification you don't want.** For fields like subsidiary, department, location, class, or customer, use **Clear value** to remove it. Clearing a suggested value also tells Fluxity you rejected it, so it stops offering it.

What happens next

When you confirm a match or correct a value, Fluxity remembers it for this vendor and gets the next invoice closer to right on its own. Your changes re-run the match, so the document reflects your latest edits, not an earlier guess.

If you get stuck

- The same wrong value keeps coming back after you correct it? Use **Make a rule** from the **why** popover to set the value you want for this vendor going forward.
- Ready to send the invoice? See [Process your first invoice](#).
- The **Push to ERP** button is blocked? See [Why can't I push?](#).

Why can't I push?

What the Push blocked banner means, and how to clear each reason a document won't send to your ERP.

What you'll do

Understand why a document shows a **Push blocked** banner, or why the **Push to ERP** button is missing, and clear it so the invoice can go to your ERP.

Before you start

- Open the document that will not push.
- Read the banner near the top. It names the exact reason, and each reason below has its own fix.

The common reasons

A required field is missing or inactive

Your ERP needs certain fields before it will accept a bill, such as a GL account, department, location, class, or customer. The page shows you exactly which ones are missing or no longer active in your ERP. Fill them in on the **GL/Vendor Matching** tab, then push again. For help coding lines, see [Correct line items and GL coding](#).

The bill already exists in your ERP

If the same bill was already created, Fluxity does not create a second one. You will see an amber **Duplicate** badge and a note that the bill already existed in your ERP. There is nothing to fix. The bill is already there.

The bill was posted directly in your ERP

NETSUITE ONLY

Sometimes a bill gets entered straight into NetSuite before Fluxity sends it. When Fluxity spots a posted bill with the same vendor, invoice number, amount, and currency, it blocks the push and names the bill it found, so a duplicate does not go out. You have one main choice: **Mark handled / link to existing bill**, which points this document at the bill that already exists. If you genuinely need a separate bill, an administrator can **Force create anyway** with a reason.

The invoice is waiting on a receipt

Some vendors are set up so a bill only goes out after the goods are confirmed received. Until the receipt arrives, the document waits in **awaiting receipt** and rechecks on its own. When the receipt shows up, it becomes ready to push again.

What happens next

Once you clear the reason, the **Push to ERP** button comes back and a successful push clears the old banner. The **Timeline** records what happened, so you can see how it resolved.

If you get stuck

- Not sure whether a field is required, or need a receipt setting or a force-create changed?

ASK YOUR ADMINISTRATOR

Some of these controls, like forcing a bill through or how receipt matching is set up, are handled by your administrator. Reach out to them with the invoice number.

- Need to fix coding first? See [Correct line items and GL coding](#).

Online version: <https://fluxity.ai/help>

Last verified September 16, 2026. The online version is always the most current.