

InvoiceIQ – Documentation

1. About the Application

InvoiceIQ is a Microsoft Power Apps application designed to simplify invoice management. Instead of scattered emails and attachments, all invoices are stored in one place – easy to review, assign, update statuses, and control payments.

The app is intuitive, but also flexible – it can be expanded with new modules and features as business needs grow.

2. Current Features

2.1. Check Invoices

Main list view of invoices. Shows key details (number, vendor, amount, due date, status). Status can be updated with one click, shows ownership, and includes counters with quick stats.

2.2. Kanban Board

Invoices in Kanban-style board divided by statuses (New, Parsed, NeedReview, Approved, Rejected). Drag-and-drop transitions, reject/restore options, search by invoice number/title.

2.3. Payments

Payment scheduling and tracking. Plan payments, update status to Processing or Paid, hold payments, gallery of payments.

2.4. Reports (planned)

Integration with Power BI for KPIs, totals, average processing times, rejection stats.

2.5. Admin Panel (planned)

Admin view for managing users, roles, vendors, data sources, integrations.

3. Roles & Permissions

Administrator – full access.

Reviewers – access to Check Invoices and Kanban.

Payments team – access only to Payments.

This ensures each user only works on what they need, while keeping data secure.

4. Automations

InvoiceIQ uses Power Automate and AI Builder.

- Power Automate detects and saves PDFs to SharePoint, triggers workflows.

- AI Builder OCR extracts invoice data and saves it to SharePoint lists used by the app.

This removes the need for manual data entry – users only verify and approve.

5. Roadmap

Planned: mobile invoice scanning (OCR), alerts, Power BI dashboards, ERP/accounting/banking integrations.

6. Business Value

Eliminates manual data entry.

Reduces errors and delays.

Transparent status view.

Easier payment control.

Scales with business needs.

Roles ensure security.

7. Summary

InvoiceIQ simplifies invoice workflows from capture to payment. Already functional for reviewing, approving, and processing payments, with future modules planned. A complete, role-based solution for invoice lifecycle management.