



Extractional User Guides

Français

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System Overview and User Management

Français

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Version: v0.1

Introduction



Annonce importante

Cette page est encore en cours de traduction dans votre langue. Pour le moment, vous pouvez utiliser cette page en anglais.

This chapter provides an overview of the system and outlines its main components and functionalities. It explains how responsibilities are distributed among different user roles, highlights key safety and access considerations, and describes the various views available within the user interface. Understanding these fundamentals will help users navigate and interact with the system effectively.



Info



Purpose and Functionality

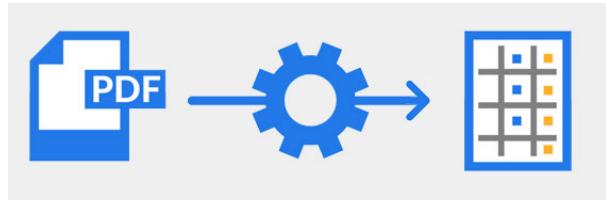
Welcome to the Extractional User Manual. In this guide, you'll find comprehensive information about how to use our software system effectively. Before diving in, we'll provide a brief overview of its purpose and explain how it can help your company streamline operations and save valuable time.

Extracting and automating purchasing documents data

The main goal of our system is to extract data from all incoming and outgoing purchasing and billing documents within a company. Once extracted, the data will be processed, allowing one to automate processes and also automatically export it into other systems, streamlining operations and reducing manual workload.

PDF files extraction

Our software will extract data from all pdf formatted files. This allows our users to not need to change all their billing habits and maintains the usage of one of the most used format for these type of documents.



Direct email account connection



This software will automatically insert all incoming billing documents in the system by directly connecting to a e-mail address. This is done via a IMAP connection, which is available for most of email domains.

Usage of numerical data

One main advantage of using our system is the complete usage of numerical data. This will ease your company easy of organisation and improve some daily tasks of your employees.

Ease of document control

One of the primary objectives we achieved with our software was to make it easy to organize all incoming and outgoing documents without consuming unnecessary employee time.

As you may know, the volume of documents most companies receive and handle can be overwhelming. Tracking the status of each document, along with the associated transactions, can be challenging to manage effectively.

Our system makes document organization straightforward while also keeping track of their status. It allows automatic assignment of documents to team members and uses flags or markers to indicate their state. Additionally, it organizes all transactions associated with each document.

Show	10	entries
#	Supplier	
2	Some other company	

Example of an existing file in our system with two flags assigned to it

Improving file searching



Since our system relies on a numerical file storage system and features quick file searching algorithms and filtering algorithm , it will improve your company's productivity by not needing to look for a specific document like the old days.

Reducing paper usage in your company



Automating document handling with our system significantly reduces paper usage. Since there is no longer a need to print documents for organizational purposes, as is common in many companies, this system allows your business to operate in an almost paperless environment.

User Management

One of the key features of our system is the ability to define different user roles and automate work distribution.

User Roles

Our system provides several predefined user roles and also allows you to create new ones. Each role comes with specific permissions, which in turn determine the user's view and capabilities within the system.\

Permissions

Permissions in the system mainly control the type of access each team member has to your document database, as well as what they can create, modify, or delete in the system.

Superuser	
<input checked="" type="checkbox"/>	Read Templates
<input checked="" type="checkbox"/>	Create Templates
<input checked="" type="checkbox"/>	Read Validations
<input type="checkbox"/>	Limited to user account
<input checked="" type="checkbox"/>	Create Validations
<input checked="" type="checkbox"/>	Modify/Save Validations
<input checked="" type="checkbox"/>	Verify Validations
<input checked="" type="checkbox"/>	Read Settings
<input checked="" type="checkbox"/>	Change Settings <ul style="list-style-type: none"> <input checked="" type="checkbox"/> can change license data <input checked="" type="checkbox"/> can change company data <input checked="" type="checkbox"/> can change analysis fields <input checked="" type="checkbox"/> can change output settings <input checked="" type="checkbox"/> can change email settings <input checked="" type="checkbox"/> can change system settings <input checked="" type="checkbox"/> can create/change user roles <input checked="" type="checkbox"/> Export validated documents
<input checked="" type="checkbox"/>	Read User Data
<input checked="" type="checkbox"/>	Create/Change Users
<input checked="" type="checkbox"/>	Read SEPA Data
<input checked="" type="checkbox"/>	Create SEPA Data
<input checked="" type="checkbox"/>	Advise Payment

Picture showing all the different permissions available in our system

Each permission has been defined to ensure that all important operations in the system can be controlled. These are the following permissions available in the system:

- **Read templates:** The user is allowed to access all templates and view them.
- **Create templates:** The user is allowed to create new templates as well as deleting/modifying existing ones
- **Read Validations:** The user is allowed to read all validations (documents) that are available in the system

- `Limited to user account`: This option can be chosen if you only want the user to be able to see all the validations that are assigned to his name.
- `Create validations`: The user is allowed to create new validation instances in the system. However, these permissions do not allow us to make these new validations as accepted in the system, they will basically be always seen as unverified documents.
- `Modify/Save Validations`: The user has the rights to modify all the data extracted in a document and to save it on the system.
- `Verify Validations`: The user has the rights to verify the documents and release them into the system.
- `Read Settings`: The user is allowed to enter the settings page and see all the different preferences chosen. He will not be able to change any data.
- `Change Settings`: The user has the permission to change some(all) settings. All the different settings sub-pages that this user shall be able to use must be specifically defined in the indented boxes.
- `Read User Data`: The user is allowed to read all the system user data.
- `Create/Change Users`: The user is allowed to create a new user or modify existing ones.
- `Read SEPA Data`: The user is allowed to read all SEPA related data (for example bank credentials of documents payments)
- `Create SEPA Data`: The user is allowed to create SEPA related data, this allowing the automation of payment of documents.
- `Advise Payment`: The user is also allowed to identify documents as \"Paid\" in the system.

Why We Use User Roles

The decision to implement user roles is straightforward: having predefined user types makes it easy to define new categories of users with a specific set of rights.\ Additionally, if a particular category of user needs different permissions, you only need to update the settings for that role rather than changing permissions individually for each user.

Simplified people management

Our software enables you to monitor your team's workload, ensuring that tasks are distributed evenly. This helps you identify and address workload imbalances early, ensuring that your team works collaboratively and efficiently.

Seamless Integration of Purchasing and Accounting Departments



Extractional creates a new and transparent connection between the purchasing and accounting departments. With all the data automatically extracted into the system and analyzed by all the different individuals in the purchasing department, the accounting will have a clear understanding each transaction made in the company.

Exporting Data

Our system also allows the users to export all the different data within the system into different formats allowing to export all the purchasing data into other systems.\ The system allows you to export in the following formats:

- **XML format:** common format allowing you to export all data into different accounting platforms such as **Sage BOB50**
- **JSON format:** commonly used format containing all information of the extracted data. Can be used to interchange data between Extractional systems.
- **CSV format:** format allowing to view all the desired data in a system's spreadsheet (for example Excel).
- **Peppol format:** international format used for interchanging electronic documents with private entities as well as with the government.
- **SEPA format:** This specific XML format allows to automate SEPA payments allowing to easily elaborate payments within a company.

Safety and Access Control

A major focus of our system is ensuring the security of your documents and controlling all access within the platform.

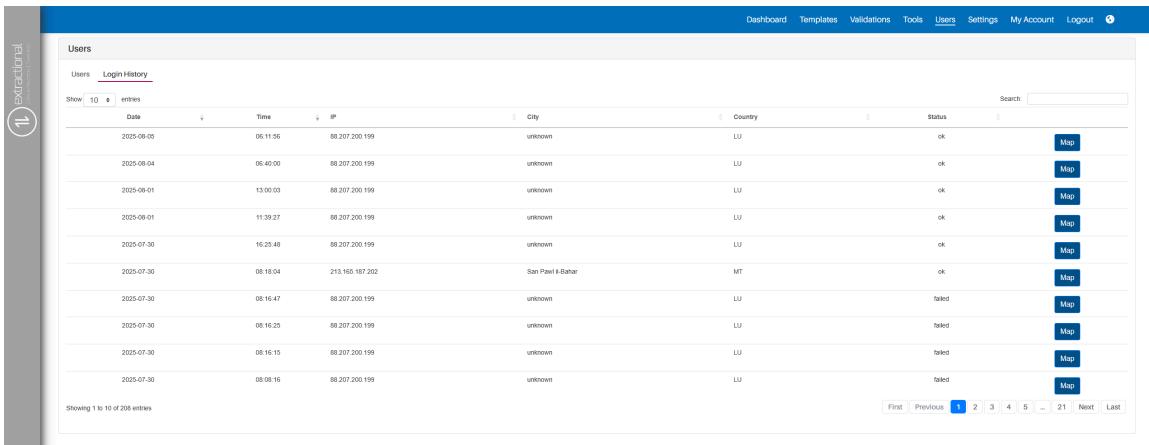
Safety within the Database

To guarantee that your company's documents are always available and secure, we ensure that they remain strictly confined within the server system you use. All system documents are stored on your server installed in your company, ensuring that your data never leaves your network unless explicitly done by you.

Access Control

To strengthen access control, we have implemented several measures in the system.\ The first is the use of role-based access control, which has already been explained in detail in a previous section.\ The second is comprehensive login tracking. The system logs every login attempt along with the IP address of the person attempting to access the platform. This allows you to

determine the origin of each access attempt. Additionally, the system records whether each login attempt was successful or not.



The screenshot shows the Extractional software interface with a dark-themed header bar containing links for Dashboard, Templates, Validations, Tools, Users (which is underlined), Settings, My Account, and Logout. On the far left, there is a vertical sidebar with the 'extractional' logo and a circular icon with a gear symbol. The main content area has a light gray background and features a table titled 'Login History'. The table has columns for Date, Time, IP, City, Country, and Status. Each row contains a 'Map' button. At the bottom of the table, it says 'Showing 1 to 10 of 208 entries'. Below the table, there is a navigation bar with buttons for First, Previous, Next, Last, and page numbers 1, 2, 3, 4, 5, ..., 21.

Date	Time	IP	City	Country	Status	Map
2025-08-05	06:11:56	88.207.200.199	unknown	LU	ok	Map
2025-08-04	06:40:00	88.207.200.199	unknown	LU	ok	Map
2025-08-01	13:00:03	88.207.200.199	unknown	LU	ok	Map
2025-08-01	11:39:27	88.207.200.199	unknown	LU	ok	Map
2025-07-30	16:25:48	88.207.200.199	unknown	LU	ok	Map
2025-07-30	08:18:04	213.160.187.202	San Patel & Bahar	MT	ok	Map
2025-07-30	08:16:47	88.207.200.199	unknown	LU	failed	Map
2025-07-30	08:16:23	88.207.200.199	unknown	LU	failed	Map
2025-07-30	08:16:15	88.207.200.199	unknown	LU	failed	Map
2025-07-30	08:08:16	88.207.200.199	unknown	LU	failed	Map

Showing 1 to 10 of 208 entries

First Previous **1** 2 3 4 5 ... 21 Next Last



System Overview

Français

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Version: v1.0

Aperçu du système

Dans ce chapitre, vous trouverez un manuel détaillé expliquant le fonctionnement de chaque page principale du système ainsi que toutes les fonctionnalités principales du système.



Information importante

Veuillez noter que certains éléments du menu présentés dans cette partie du manuel pourraient ne pas être disponibles pour vous ; cela dépendra directement des droits dont vous disposez dans le système.

Principes généraux

Principes de navigation généraux pour tous les tableaux

Exemple d'un tableau :

Released Documents							
Incoming Documents		Outgoing Documents					
Name	Released (in time-frame)	Released (total)	Released Amount (in time-frame)	Released Amount (total)	Oldest released (in time-frame)	Oldest released (total)	Search <input type="text"/>
Tom Kieffer (tk@extractional.com)	0	1	0.0 €	58207.12 €	2024-07-02	2024-07-02	
Renaud Kieffer (rk@extractional.com)	0	1	0.0 €	58207.12 €	2024-07-01	2024-07-01	
Unassigned Documents	0	3	0.0 €	47745.22 €	2025-02-03	2025-02-03	
Andre Wellnitz (andre.wellnitz@kieffer.com)	0	1	0.0 €	46.79 €	2024-07-09	2024-07-09	
Maria Schmidt (ms@extractional.com)	0	2	0.0 €	0.0 €	2023-07-25	2023-07-25	
Manfred Muench (admin@balamedia.com)	1	1	0.0 €	0.0 €	2025-08-06	2025-08-06	
Showing 1 to 6 of 6 entries							
First Previous 1 Next Last							

Pour améliorer l'ergonomie de tous les tableaux, plusieurs fonctionnalités de navigation sont disponibles :

- Pour passer entre les documents **Entrants** et **Sortants**, utilisez les onglets en haut du tableau.
- Pour trier les éléments du tableau par une colonne spécifique, cliquez sur l'en-tête de colonne. Une icône indiquera l'ordre de tri actuel (ascendant ou descendant). Un clic répété bascule entre les options de tri ou supprime le tri.
- Pour rechercher une ligne spécifique, utilisez la barre de recherche dans le coin supérieur droit du tableau. Les recherches sont effectuées en fonction des informations visibles dans le tableau.

- Pour ajuster le nombre de lignes affichées par page, cliquez sur l'indicateur actuel du nombre d'éléments par page en haut du tableau et sélectionnez la quantité souhaitée.
- Pour naviguer entre les pages, utilisez les contrôles de pagination situés en bas du tableau.



System Overview-Dashboard

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Tableau de bord

Quel est l'objectif principal de cette page

Dans cette page de tableau de bord, vous trouverez de nombreux tableaux et statistiques utiles qui vous aideront à organiser et à avoir une vue d'ensemble de votre travail.

Si vous êtes un super utilisateur ou une personne disposant de droits pour observer tous les utilisateurs et documents de votre entreprise, vous aurez également des visualisations et tableaux supplémentaires à votre disposition pour analyser la performance des utilisateurs et les flux de trésorerie futurs.

Dans les paragraphes suivants, vous trouverez tous les différents tableaux et visualisations disponibles.

Aperçu

The screenshot shows the Extractional dashboard interface. At the top, there's a header bar with links for Dashboard, Validations, Tools, My Account, and Logout. Below the header, a sidebar on the left has a 'Dashboard' section with a clock icon and the word 'extractional'. The main content area is divided into several sections:

- Dashboard:** Shows validation counts: 22 in progress since July 31, 2025, 4 incoming document validations (4 via email, 0 manual), 0 outgoing document validations, 20 complete validations, 3 incomplete validations, and 1 document released.
- Invoice Statistics:** A link to system statistics.
- Pending Document Releases:** A table for incoming documents. Headers include Name, Unreleased (in time-frame), Unreleased (total), Unreleased Amount (in time-frame), Unreleased Amount (total), Oldest unreleased (in time-frame), and Oldest unreleased (total). It shows 0 entries. Buttons for Show 10 entries, First, Previous, Next, and Last are present.
- Released Documents:** A table for outgoing documents. Headers include Name, Released (in time-frame), Released (total), Released Amount (in time-frame), Released Amount (total), Oldest released (in time-frame), and Oldest released (total). It shows 0 entries. Buttons for Show 10 entries, First, Previous, Next, and Last are present.
- Average Release Durations:** A section showing average release durations for incoming and outgoing documents. It includes Average Release Duration (in time-frame) and Average Release Duration (total).

Définir votre période

Avant de réaliser une analyse ou d'interagir avec le tableau de bord, il est essentiel de définir d'abord la période dans le tableau de bord. La période sélectionnée détermine quels

documents seront inclus dans tous les tableaux et visualisations disponibles.

Pour modifier la période, cliquez sur la zone de texte de la période actuelle située en haut de l'écran et ajustez-la selon vos préférences. Pour plus d'informations sur la modification de la période, veuillez consulter le ([lien suivant](#)), qui vous dirigera vers la section pertinente de ce manuel où le sous-menu de la période est expliqué en détail.

Analyse des statistiques générales dans les premières cases

Un des premiers éléments que vous remarquerez sur la page du tableau de bord est quatre cases affichant des informations statistiques générales sur votre système.

Première vue

Pour aider à identifier les cases référencées, un exemple visuel de leur apparence dans votre système est fourni ci-dessous.



Informations fournies dans ces cases

Ces cases contiennent des informations générales conçues pour vous aider à évaluer rapidement l'état actuel du système. Cela peut fournir des informations utiles et vous aider à prioriser vos tâches ou opérations de l'entreprise.

Navigation entre les différents onglets

Sur la page du tableau de bord, toutes les fonctionnalités sont divisées en sous-pages. Vous pouvez naviguer entre ces pages en changeant d'onglet en haut de l'écran.

Voici un exemple de l'apparence de ces onglets :

[Invoice Statistics](#) [System Statistics](#)

Les sections suivantes expliquent les fonctionnalités disponibles sur chacune de ces pages.

Statistiques des factures

Cette sous-page du tableau de bord affiche des informations statistiques liées aux documents émis pendant la période sélectionnée.



Information importante

Avant d'analyser les documents présents dans le système, veuillez noter que si vous n'avez pas l'autorisation de voir les validations des autres, vous ne verrez que les documents que vous avez émis.

Nous allons maintenant passer en revue chaque visualisation disponible sur cette sous-page.

Tableau des documents en attente de validation

Aperçu

Ce tableau affiche tous les documents actuellement en attente de validation dans votre système. Il montre la personne à qui chaque document est attribué, ainsi que des informations détaillées sur le nombre et la valeur des documents dont chaque individu est responsable.

Voici un exemple de l'apparence de ce tableau :

Pending Document Releases							
Incoming Documents		Outgoing Documents					
Name		Unreleased (in time-frame)	Unreleased (total)	Unreleased Amount (in time-frame)	Unreleased Amount (total)	Oldest unreleased (in time-frame)	Oldest unreleased (total)
Tom Kieffer (tk@extractional.com)		2	14	0.0 €	477641.68 €	2023-06-06	2023-07-03
Unassigned Documents		1	4	0.0 €	224.8 €	2023-06-06	2023-06-26
Andre Wellnitz (andre.wellnitz@kieffer.com)		0	3	0.0 €	146.37 €		2024-06-27
Maria Schmidt (ms@extractional.com)		0	2	0.0 €	0.0 €		2023-07-07

Showing 1 to 4 of 4 entries

First Previous 1 Next Last

Tableau des documents validés

Aperçu

Ce tableau affiche tous les documents déjà validés dans votre système. Chaque entrée inclut la personne à qui le document est attribué, ainsi que diverses statistiques, telles que le nombre et la valeur des documents validés par individu. De plus, tous les documents validés sans personne assignée seront représentés dans une ligne distincte (appelée également "Documents non assignés").

Voici un exemple de l'apparence du tableau :

Released Documents							
Incoming Documents		Outgoing Documents					
Name		Released (in time-frame)	Released (total)	Released Amount (in time-frame)	Released Amount (total)	Oldest released (in time-frame)	Oldest released (total)
Tom Kieffer (tk@extractional.com)		0	1	0.0 €	58207.12 €	2024-07-02	
Renaud Kieffer (rk@extractional.com)		0	1	0.0 €	58207.12 €	2024-07-01	
Unassigned Documents		0	3	0.0 €	47745.22 €		2025-02-03
Andre Wellnitz (andre.wellnitz@kieffer.com)		0	1	0.0 €	48.79 €		2024-07-09
Maria Schmidt (ms@extractional.com)		0	2	0.0 €	0.0 €		2023-07-25
Manfred Muench (admin@baiamedia.com)		1	1	0.0 €	0.0 €	2025-08-06	2025-08-06

Showing 1 to 6 of 6 entries

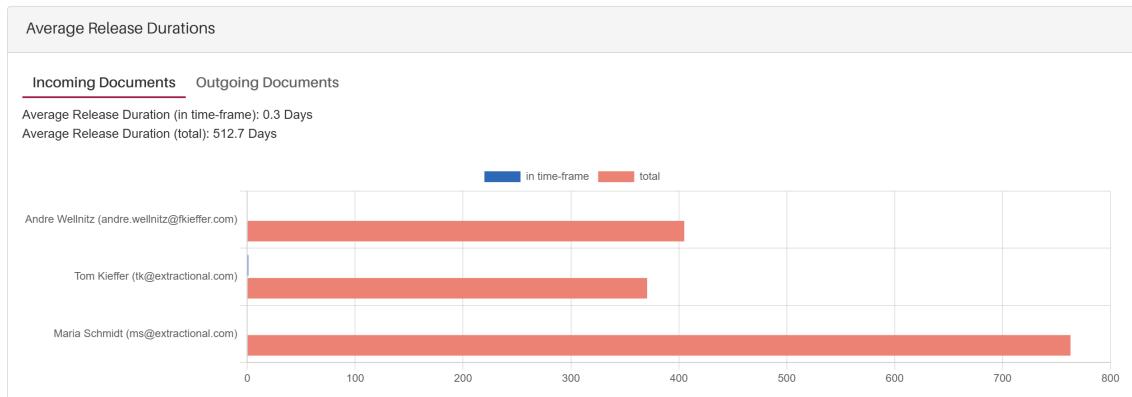
First Previous 1 Next Last

Durée moyenne de validation

Aperçu

Cet histogramme montre le temps moyen que chaque personne prend pour valider les documents qui lui sont assignés.

Pour mieux comprendre, voici un exemple de visualisation :



Navigation dans l'histogramme

Chaque ligne représente un membre de l'équipe avec le temps moyen de validation pour cet individu. Selon la couleur de la case, la moyenne affichée peut se référer à :

- La durée moyenne pendant la période définie, ou
- La durée moyenne totale sur l'ensemble de ses documents.

Pour passer entre les documents **entrants** et **sortants**, utilisez les onglets en haut de l'histogramme.

Pour masquer une catégorie ("Dans la période" ou "Total"), cliquez simplement sur le label de la catégorie en haut de l'histogramme.

Statistiques des modèles

Aperçu

Cette sous-section vous permet de visualiser la performance de chaque modèle utilisé pendant la période sélectionnée.



Information importante

Veuillez noter que si vous n'avez pas les permissions nécessaires pour créer ou modifier des modèles, cette page apparaîtra vide.

Voici un exemple de l'apparence de cette page :

Template Statistics			
Extractional (3)		automated	edited
Customer Number		-	-
General Ledger Account		-	-
Invoice Date	100.0%	100.0%	
Invoice Number	100.0%	100.0%	
Order Number	100.0%	100.0%	
Project Manager	100.0%	100.0%	
Project Number	100.0%	100.0%	
Reference	-	-	
Sum (gros)	0.0%	100.0%	
Sum (net)	100.0%	100.0%	
Supplier Address	100.0%	100.0%	
Supplier Bank	100.0%	100.0%	
Supplier City	100.0%	100.0%	
Supplier Country (2-Letter Code)	100.0%	100.0%	
Supplier IBAN	100.0%	100.0%	
Supplier Name	100.0%	100.0%	
Supplier Postcode	100.0%	100.0%	
VAT	100.0%	100.0%	
VAT Rate	100.0%	100.0%	

SOYC-IETS (1)			
		automated	edited
Customer Number		-	-
General Ledger Account		-	-
Invoice Date	100.0%	100.0%	
Invoice Number	100.0%	100.0%	
Order Number	100.0%	100.0%	
Project Manager	100.0%	100.0%	
Project Number	100.0%	100.0%	
Reference	-	-	
Sum (gros)	0.0%	100.0%	
Sum (net)	100.0%	100.0%	
Supplier Address	100.0%	100.0%	
Supplier Bank	100.0%	100.0%	
Supplier City	100.0%	100.0%	
Supplier Country (2-Letter Code)	100.0%	100.0%	
Supplier IBAN	100.0%	100.0%	
Supplier Name	100.0%	100.0%	
Supplier Postcode	100.0%	100.0%	
VAT	100.0%	100.0%	
VAT Rate	100.0%	100.0%	

Navigation dans cette sous-page

Chaque modèle utilisé pendant la période définie est affiché comme une tuile individuelle. Dans chaque tuile, vous trouverez les métriques de précision d'extraction pour chaque champ associé à ce modèle.

Si vous souhaitez modifier un modèle spécifique, vous pouvez le faire directement en cliquant sur l'icône d'édition située en haut à droite de la tuile. L'icône d'édition apparaît comme suit :



Statistiques du système

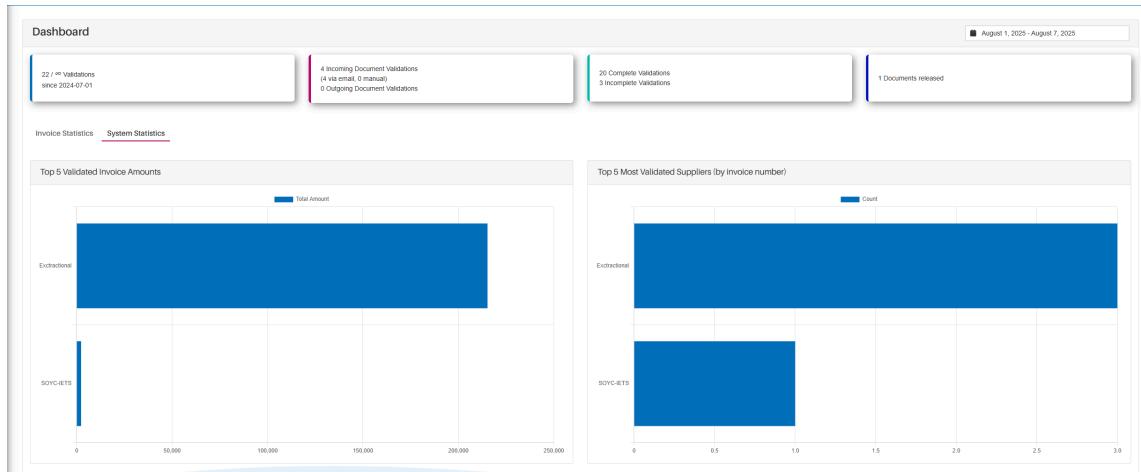
Cette sous-page fournit un aperçu des informations statistiques liées à la performance globale du système pendant la période sélectionnée.



Information importante

Étant donné qu'aucune information sensible n'est présentée dans ces visualisations, tous les utilisateurs ont un accès complet à cette sous-page.

Voici un exemple de mise en page de cette page :



Navigation dans les visualisations

En faisant défiler cette page, vous rencontrerez différents histogrammes et autres types de représentations visuelles. Les fonctionnalités d'interaction suivantes sont disponibles :

- Pour voir des valeurs spécifiques ou des informations supplémentaires pour un point de données particulier dans une visualisation, survolez-le avec la souris. Une infobulle apparaîtra avec des détails.
- Certaines visualisations offrent des onglets de paramètres permettant de filtrer ou d'ajuster les données affichées. Pour changer les paramètres, passez entre les onglets disponibles.

Liste de tâches

Aperçu

Dans cette liste, nous visualiserons les différentes validations actuellement assignées à vous et qui doivent être traitées par vous.



Note

Veuillez noter que toutes les validations affichées dans la liste de tâches apparaissent uniquement en fonction de la période sélectionnée.

La liste de tâches se trouve au début du tableau de bord et devrait ressembler à ceci :

To-Do List						
Show	10	entries	Search:			
#	Supplier	Date	Document Type	Release Status	Responsible	Last Update
9	Postopare_invoice	2025-08-25	Invoice	Verified		2025-08-25
Showing 1 to 1 of 1 entries						
First		Previous	1	Next	Last	

Comment interagir directement avec une ou plusieurs validations

Pour visualiser directement une validation, cliquez simplement sur le bouton de visualisation de la validation correspondante.

De plus, si vous souhaitez visualiser plusieurs validations en même temps, vous pouvez sélectionner toutes les validations souhaitées dans le tableau et cliquer sur le bouton de visualisation d'une des validations pour ouvrir toutes les validations dans le système.



System Overview-Template

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Modèle

Version: v1.0

Modèle

Quel est le but principal

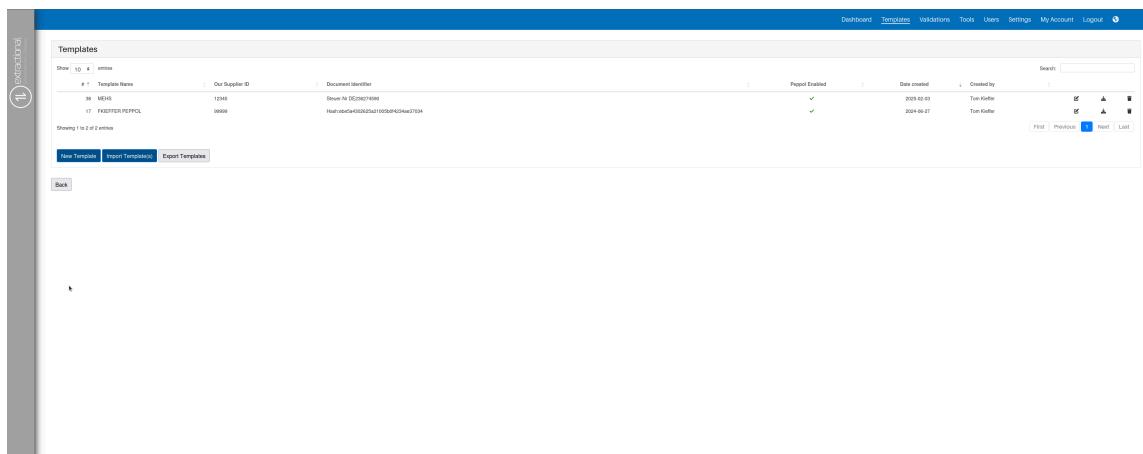
Sur cette page, l'utilisateur définit tous les différents modèles pour tous les différents types de documents qu'il souhaite automatiser dans le système pour la collecte de données.\ De plus, l'utilisateur a également la possibilité de gérer tous les modèles actuellement créés.

Prérequis

Avant de commencer à créer les différents modèles, il est recommandé de définir toutes les données qui devront être collectées dans votre système. To do so, you shall go into the application settings and define all the data that shall be collected in your system. You can find more information in the [the following section](#).

En outre, il est également recommandé de définir le type d'utilisateur qui a l'autorisation de créer ou de gérer l'application. Plus d'informations dans [ce lien](#).

Aperçu

A faint watermark of a circular logo with the letters 'B' and 'C' inside is visible across the entire page.

The page header features a dark blue navigation bar with white text and icons. On the left is a vertical sidebar with a 'Dashboard' icon, followed by 'Templates' in large font, 'Components' (partially visible), and a user profile icon. The main menu includes 'Dashboard', 'Templates', 'Validations', 'Tools', 'Users', 'Settings', 'My Account', and 'Logout'. A search bar is located on the right side of the header.

Templates

Show: 10 | 4 | All rows

#	Template Name	Our Supplier ID	Document Identifier	Populated	Date created	Created by
38	MH48	12345	Steve Al DC2024074980	✓	2023-07-03	Tom Kelle
17	FAZIOTER/PEPPOL	99999	Healthcare4502625421905042034ae37124	✓	2024-07-27	Tom Kelle

Showing 1 to 2 of 2 entries

[New Template](#) [Import Template](#) [Export Templates](#)

[Back](#)

Aperçu des fonctionnalités

Ajouter un nouveau modèle

Dans cette partie, vous trouverez un guide étape par étape expliquant comment ajouter un nouveau modèle à votre système.

DÉCLENCHER LE SYSTÈME

Pour déclencher le système, il suffit de cliquer sur le bouton "New Template". Vous serez alors redirigé vers la page suivante :

The screenshot shows the 'Create Template' interface. On the left, there's a sidebar with a logo and navigation links. The main area has a header 'Create Template'. Under 'Upload PDF file', there's a red-bordered input field with the placeholder 'Browse... No file selected'. Below it is a preview area labeled 'Invoice Template' with a small 'Show Images' checkbox. To the right is a 'Data Collection' panel with sections for 'Template Name' (set to 'Currency'), 'Document Category' (set to 'Invoice'), 'Document Type' (set to 'Invoicing Document'), and 'Our internal supplier identifier'. A note says 'Please mark Field Ctrl key to mark multiple fields'. Below these are sections for 'Supplier' (with a note 'There can only be one unique supplier associated this document with the supplier'), 'Order Number', 'Project Manager', 'Customer Number', and 'Project' (all with 'Identifying Label' and 'Example Value' fields). At the bottom right of the panel are several 'Search' and 'Delete' buttons.

TELECHARGER UN FICHIER MODÈLE

À cette étape, vous allez télécharger un fichier modèle afin que le système dispose d'une base. Pour ce faire, cliquez sur le bouton "Browse file" en haut à gauche de l'écran. Après avoir cliqué sur ce bouton, vous serez redirigé vers l'outil de sélection de fichiers de votre système d'exploitation pour choisir le modèle souhaité.

Une fois le fichier sélectionné, cliquez sur le bouton "Upload". Le système téléversera alors le fichier et cela ressemblera à ceci :

The screenshot shows the 'Create Template' interface after a PDF file has been uploaded. The 'Upload PDF file' section now displays the file name 'FACTURE_20220601.pdf'. The 'Invoice Template' preview area shows a sample invoice document with details like 'Date', 'Réf facture', 'Réf bon de livraison', and various line items with descriptions and prices. The 'Data Collection' panel remains largely the same as in the previous screenshot, with the 'Template Name' set to 'Currency' and other fields like 'Document Category' (Invoice), 'Document Type' (Invoicing Document), and 'Our internal supplier identifier' filled in. The 'Supplier' section is also present with its notes and example values.

DÉFINIR TOUS LES DIFFÉRENTS CHAMPS

Cette étape est la plus chronophage et également la plus importante. Vous y définirez tous les champs nécessaires pour l'automatisation future.

Avant de commencer l'analyse du document, gardez à l'esprit que vous pouvez toujours supprimer partiellement ou complètement toutes les images d'un PDF. Pour ce faire, utilisez la case à cocher "Show Images" afin d'afficher toutes les images du fichier. Vous pouvez ajuster la visibilité à tout moment à l'aide de la barre de défilement située juste après le champ "Show Images".

Important

Vous pouvez utiliser des images dans les différents champs comme valeurs, par exemple pour l'identification. Le système hachera l'image et enregistrera l'information hachée. Cependant, utiliser des images comme identifiants comporte le risque que le modèle ne soit pas reconnu même si l'image change d'un seul pixel. Nous recommandons donc d'utiliser des images comme identifiant uniquement en dernier recours.

Tout d'abord, vous devez définir tous les champs qui constitueront les propriétés de base du modèle, comme le nom du modèle, la devise et le type de document.

Choisir un identifiant unique

Ensuite, vous devez saisir le champ qui permettra d'identifier tout document pour déclencher l'utilisation de ce modèle. Nous recommandons toujours d'utiliser un texte ou une valeur qui sera toujours présent(e) dans ce type de document de l'entreprise ainsi qu'un identifiant du type de document (par exemple, le numéro de TVA de l'entreprise associé à l'indication qu'il s'agit d'une facture).

Pour sélectionner le(s) champ(s) à utiliser comme identifiant(s), vous devez d'abord cliquer dans la "Supplier box" puis cliquer sur le(s) champ(s) à utiliser comme identifiant(s) dans le document. Si vous souhaitez utiliser plusieurs identifiants, maintenez la touche "Ctrl" enfoncée et sélectionnez tous les champs.

Vous pouvez également utiliser des images comme identifiants de documents, mais cela doit être le dernier recours puisque les entreprises changent parfois l'apparence de leurs documents.

Il existe deux façons de définir l'automatisation des champs : l'insertion automatique et l'insertion manuelle.

Tous les champs automatisés sont ceux que le système identifiera dans chaque facture, tandis que les champs manuels sont des constantes et resteront toujours identiques dans tous les documents. Nous recommandons de définir toutes les constantes comme champs manuels afin d'améliorer la cohérence et l'efficacité du système.

Pour définir tous les champs automatisés et les identifiants correspondants, vous devez utiliser la même technique que pour le champ d'identification, mais cette fois une fois pour l'identifiant des données et une autre pour la valeur des données. Pour les champs manuels, vous devez

d'abord cliquer sur le bouton du clavier puis insérer la valeur correspondante dans le système. Vous pouvez taper la valeur manuellement ou utiliser la même technique qu'auparavant.

Astuce

Comment définir de bons candidats pour les paires "identifiant"/"valeur" :

- La distance entre l'identifiant et la valeur n'affecte pas la performance de l'algorithme.
- Vous devez vous assurer que l'identifiant sera toujours présent dans le document, même si cela implique d'utiliser un identifiant situé à une plus grande distance de la valeur réelle.
- Sélectionnez toujours la valeur entière et non une partie de celle-ci (sauf dans la description des lignes d'articles).

À la fin, votre système devrait ressembler à ceci :

The screenshot shows the Extractional software interface. On the left, a PDF file titled 'FACTURE_202009-07160.pdf' is displayed, showing an invoice from 'Espace Projet' dated '21.09.2020'. The invoice details include various items with descriptions and amounts. On the right, a 'Data Collection' table is shown, listing various fields with their identifying labels and example values. The fields include REF, T.LOV, Project Number, Reference, Invoice Number, Invoice Date, Delivery Address, Basis H.T., VAT Rate, VAT, and Total TTC EUR. Each field has a 'Sélectionner' checkbox next to it.

Importer et exporter des modèles

Si vous souhaitez importer les modèles actuels dans un autre système ou les envoyer au support, vous devez utiliser cette fonctionnalité.

EXPORTER DES MODÈLES

Pour exporter des modèles, il suffit de cliquer sur le bouton "Export Templates" et le téléchargement du fichier zip démarrera automatiquement. Ce fichier zip contiendra toutes les informations de tous les modèles créés dans votre système.

IMPORTER DES MODÈLES

Pour importer des modèles, cliquez sur le bouton "Import Template(s)" et choisissez le fichier zip contenant tous les modèles précédemment exportés.

Boutons et fonctionnalités supplémentaires

Cette partie expliquera tous les boutons supplémentaires et leur utilisation.

BOUTON MODIFIER

Le bouton de modification permet de déclencher le système pour modifier un modèle spécifique. Ce bouton est visible dans chaque modèle et se présente sous la forme de l'icône suivante :



Une fois que vous avez cliqué sur ce bouton pour un modèle spécifique, vous accédez à la page où vous pouvez modifier tous les champs de ce modèle.

BOUTON SUPPRIMER

Le bouton de suppression permet de supprimer un modèle spécifique de votre système. Ce bouton est également visible dans chaque modèle et se présente sous la forme de l'icône suivante :



⚠️ Important

Sachez que si un modèle est supprimé, les validations créées avec ce modèle **ne perdront pas** leurs données extraites. En effet, le modèle n'est utilisé que pendant le processus d'extraction, après quoi toutes les données sont stockées indépendamment.

CASE À COCHER PEPPOL ACTIVÉ

Dans cette colonne du tableau, vous pouvez vérifier si un modèle extrait ou non toutes les lignes d'articles du document.

Tous les modèles cochés extrairont les données d'en-tête ainsi que toutes les lignes d'articles de ce type de document, tandis qu'un modèle non activé pour Peppol n'extraira que les données d'en-tête du fichier concerné.



System Overview-Validations

Français

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Version: v1.0

Validation

Quel est l'objectif principal

Dans cette page, vous pouvez voir tous les différents documents qui sont entrés dans le système et qui nécessitent une validation par un individu avant d'être acceptés dans le système. Tous les documents qui ont été validés peuvent également être consultés et examinés sur cette page.

Tous les documents peuvent entrer automatiquement dans le système via une connexion avec une adresse e-mail dédiée, ou vous pouvez aussi ajouter manuellement un document au système.

De plus, tous les documents sont séparés entre ceux qui sont entrants et sortants, respectivement pour l'entreprise.

Comment fonctionne l'algorithme Extractional

L'algorithme Extractional recherchera un modèle adapté et commencera ensuite à extraire les valeurs en fonction de ce modèle. Si certains champs ne sont pas reconnus, ils restent vides, et vous aurez la possibilité de les remplir manuellement (sauf s'ils ont été définis comme champs non modifiables).

En outre, si le système ne trouve aucun modèle correspondant, il n'extraira aucune donnée et laissera tous les champs vides. Une icône visuelle rouge sera affichée sur la validation correspondante.

De plus, si le système trouve deux modèles différents pour le même document, il utilisera simplement le premier.

Prérequis

Il existe quelques prérequis que nous recommandons avant de commencer à créer et valider le système.

La première chose qui doit déjà être définie dans le système est la création de tous les modèles souhaités, car sinon l'utilisateur ne pourra pas profiter des avantages d'Extractional.



Important

En outre, nous recommandons fortement de définir tous les rôles avant d'autoriser la validation dans le système. Cela vous permettra de contrôler qui sont les personnes ayant le droit de valider les documents dans votre système/entreprise.

Aperçu

The screenshot shows the 'Validated Documents' section of the Extractional software. At the top, there are tabs for 'Incoming Documents' and 'Outgoing Documents'. A search bar is present with the placeholder 'Filter: none'. Below the search bar, there are filters for 'Supplier' (set to 'PIFLEFFER & MAY Döingen GmbH & Co KG') and 'Show' (set to '10'). The main table displays two rows of data:

Invoice Number / File Name	Document Category	Release Date	Released By	Responsible	Date
ED00000007 Technische Zeichnung				Claudia Trott Reinhard Käfer Mark Schmid	2025-08-01 12:24

At the bottom of the table, it says 'Showing 1 to 1 of 1 entries'. There are buttons for 'New Validation' and 'Export Selection' on the left, and 'Find', 'Previous', 'Next', 'Last', and 'Check Error Items' on the right.

Aperçu des principales fonctionnalités

Créer une nouvelle validation

Dans cette partie, nous expliquerons comment une validation peut être créée. De plus, nous recommandons fortement d'avoir un e-mail dédié directement connecté au système, car cela fera gagner un temps considérable à votre entreprise.

Lecture à partir d'une boîte e-mail

L'automatisation par e-mail est définie dans la page des paramètres ; si vous voulez plus d'informations sur cette fonctionnalité, cliquez sur le [lien](#).

Insertion manuelle

Dans cette partie, vous trouverez un guide étape par étape sur la façon d'insérer manuellement une nouvelle validation dans le système.

La première étape consiste à déclencher le système pour indiquer que vous souhaitez ajouter une nouvelle validation. Cela peut être facilement fait en cliquant sur le bouton « Nouvelle validation » situé en bas à gauche de la page Validation.

Une fois que vous avez cliqué sur le bouton, vous devriez être redirigé vers une nouvelle page qui ressemble à ceci :

The screenshot shows the 'Extract Data from Document' interface. At the top, there's a navigation bar with links for Dashboard, Templates, Validations, Tools, Users, Settings, My Account, and Logout. Below the navigation is a section titled 'Extract Data from Document' with a sub-section 'Upload PDF file'. A button labeled 'Browse...' is highlighted with a red box, indicating where the user should click to select a file. The main area below the upload section is currently empty.

La deuxième étape consiste à sélectionner le fichier que vous souhaitez télécharger dans le système. Cela peut être fait en cliquant sur le bouton **Parcourir...** et en utilisant la boîte de dialogue de sélection de fichiers de votre système d'exploitation.

Après avoir choisi le fichier souhaité, vous devez l'envoyer dans le système en cliquant sur le bouton « Télécharger ». Une fois cliqué, le système ressemblera à ceci :

The screenshot shows the 'Extract Data from Document' interface with a preview of a PDF document titled 'Rechnung_XM001.22.009427.pdf'. The document contains a receipt for 'Kieffer Francois Chauffage-Sanitair' located at '32, Rue d'Orange 5333 Mousfort Luxembourg'. The receipt details include customer information like 'Kunden-Nr.: XM0017', 'Beleg-Nr.: 0-22-099427', and 'Belegdatum: 17.02.22'. It also lists shipping and payment information. To the right of the document, there is a 'Data Collection' panel containing various input fields for supplier and customer details, such as 'Supplier Name', 'Supplier City', 'Customer Company Name', and 'Customer Address'. Some fields have placeholder values like 'DE', 'Differdange', and 'Kieffer Francois Chauffage Sanitair'.

⚠️ Important

La troisième et dernière étape consiste à vérifier toutes les entrées dans la section Collecte de données de la page. Voici quelques recommandations : ajouter des notes utiles pour d'autres utilisateurs, compléter et vérifier tous les champs respectifs. La plupart des validations créées auront déjà des valeurs assignées automatiquement grâce aux modèles, mais nous recommandons toujours de tout vérifier et, si nécessaire, de corriger ou compléter certaines valeurs.

Une fois toutes les étapes réalisées, vous aurez deux choix : enregistrer l'entrée actuelle ou la valider. Attention : pour valider une entrée, vous devez avoir les droits nécessaires.

Pour sauvegarder la validation, cliquez sur le bouton « Sauvegarder les valeurs » en bas à gauche de la fenêtre de collecte des données.

Pour revenir à la page principale de validation, cliquez simplement sur le bouton « Retour » en bas à gauche.

Validation (libération) d'un document

Que signifie la libération d'un document dans notre système ?

Dans le contexte de notre système, la libération d'un document correspond au processus d'acceptation du document dans le système global. Après sa libération, il est traité comme **validé**.

Important

Attention : pour libérer un document, vous devez avoir les droits nécessaires.

Étapes de validation d'un document

La première étape est d'ouvrir une nouvelle validation qui n'a pas encore été libérée. Si vous devez encore en créer une, reportez-vous au [chapitre sur la création d'une validation](#).

Pour ouvrir une validation existante, cliquez sur l'icône de visualisation correspondante :



La deuxième étape, et la plus importante, est de vérifier toutes les entrées de la fenêtre de collecte des données.

Pour changer une valeur, cliquez sur le champ correspondant, puis modifiez soit en cliquant sur la valeur correcte dans le fichier, soit en la saisissant manuellement.

Important

Vous ne pourrez corriger les valeurs que si le champ est défini comme modifiable. Plus d'informations dans la [page Paramètres](#).

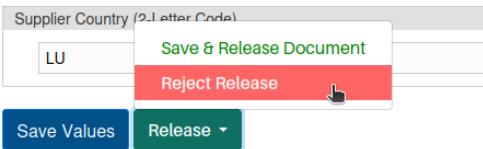
Une fois les données vérifiées, vous pouvez décider de libérer le document ou non.

Si vous souhaitez le libérer, cliquez sur le bouton « Libérer » en bas de la fenêtre de collecte des données, puis confirmez l'acceptation. Exemple :



Après validation, une fenêtre contextuelle vous indiquera si l'opération a réussi.

Si vous souhaitez **refuser** la validation, cliquez également sur le bouton « Libérer » puis choisissez de rejeter. Exemple :



Si vous refusez une validation, une fenêtre contextuelle apparaîtra pour écrire une note simple expliquant la raison du refus du document ou pour préparer l'e-mail qui sera envoyé à la personne qui a transmis ce document à votre adresse e-mail. Cela dépend bien sûr de la manière dont la validation a été créée ainsi que de la configuration du système.

Une fois que vous avez terminé la libération d'un document, vous pouvez toujours revenir à la page principale de Validation en cliquant sur le bouton « Retour » en bas à gauche de la page.

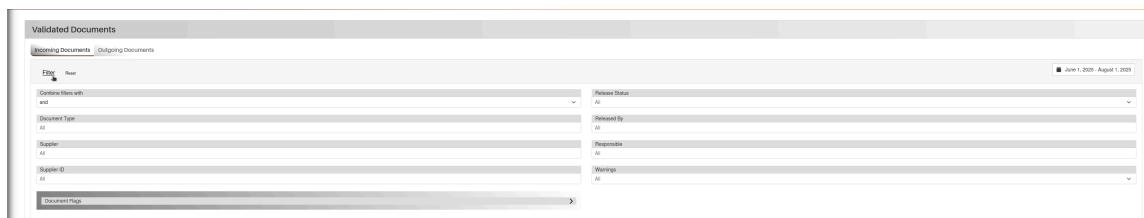
Fonctionnalités secondaires et conseils utiles

Dans cette section, nous allons présenter toutes les fonctionnalités secondaires ; elles sont cependant aussi importantes que les principales, car elles amélioreront considérablement votre flux de travail au quotidien.

Fonction de filtrage

Le filtrage peut être utile lorsque vous essayez de rechercher un document spécifique dans votre système ou si vous souhaitez uniquement traiter un sous-groupe de toutes les validations.

Pour ouvrir le menu de filtrage, vous devez cliquer sur le texte « Filtrer » visible sur la page principale de Validation. Après avoir cliqué sur ce bouton, votre système devrait ressembler à ceci :



Maintenant que vous avez ouvert le menu de filtrage, vous pouvez choisir les critères à appliquer ainsi que la manière dont ils doivent être combinés. Vous avez deux options : « **et** » ou « **ou** ».

De plus, si vous souhaitez supprimer tous les filtres, vous pouvez cliquer sur le champ texte **Réinitialiser** situé à côté du texte **Filtrer**. Tous les filtres seront alors remis à leur état par défaut.

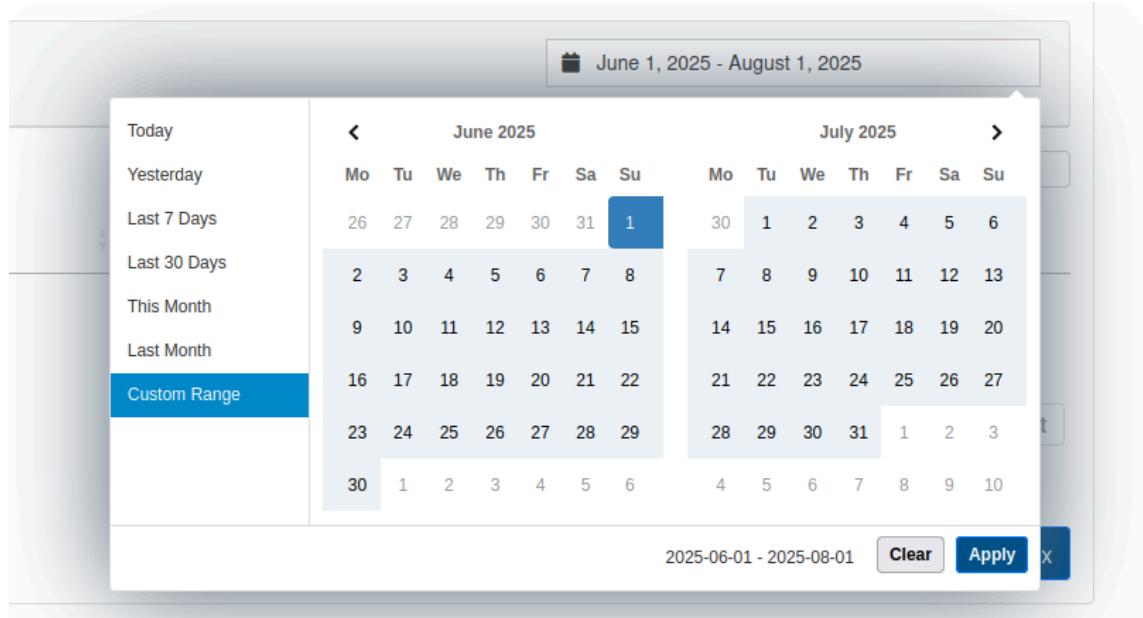
Modification de la période

Une autre fonctionnalité secondaire est de définir la période de temps des documents que vous souhaitez visualiser. Cette période détermine quels documents apparaissent dans le tableau de validation. La date considérée est la **date d'entrée du document dans le système**.

⚠️ Important

La période est toujours considérée en plus des filtres et de la recherche en texte intégral. Si un document ne correspond pas à la période définie, il ne peut jamais être trouvé, indépendamment des filtres ou des critères de recherche.

Pour définir la période, cliquez simplement sur l'icône calendrier en haut à droite du système. Vous verrez la fenêtre suivante :



Vous avez deux possibilités :

- Choisir une option prédéfinie sur le côté gauche (exemple : `7 derniers jours`)
- Définir une période personnalisée en sélectionnant une date de début puis une date de fin avec votre souris.

Une fois satisfait, cliquez sur le bouton **Appliquer** en bas à droite de la fenêtre.

⚠️ Important

Le temps de chargement peut être long, surtout si un grand nombre de fichiers doivent être chargés dans le système.

Utilisation de la barre de recherche

Si vous souhaitez rapidement trouver un fichier spécifique, vous pouvez utiliser la barre de recherche.

Comment utiliser la barre de recherche

Écrivez une information concernant le fichier recherché dans le champ texte situé à côté de **Recherche**.

Une fois le texte saisi, le système effectuera une recherche dans tous les fichiers de la table actuelle. Il trouvera les éléments contenant l'intégralité des informations saisies.

⚠️ Important

Les seuls champs disponibles pour la recherche sont ceux qui ont été définis comme « activés » ou « cachés ».

Veuillez noter que le système ne recherche que dans les métadonnées visibles dans la page principale de validation.

Lier des personnes aux documents

Dans cette partie, vous apprendrez à assigner une validation à un utilisateur du système. Cela peut être utile si vous souhaitez désigner quelqu'un pour libérer un document spécifique ou préciser le responsable du document.

Cliquez sur l'icône suivante :



Une fenêtre s'ouvrira, et vous pourrez lier une personne à la validation choisie.

Exportation de documents

Dans cette partie, nous expliquerons comment exporter des documents dans un format choisi.

Deux options existent : exporter un seul document ou exporter l'intégralité de la table.

⚠️ Important

Attention : tous les documents que vous souhaitez exporter doivent être libérés.

Si vous choisissez d'exporter en CSV ou XML, le format doit aussi être défini dans les paramètres. (Lien explicatif à ajouter.)

Exporter un seul fichier

Commencez par afficher le fichier à exporter.

La section d'exportation se trouve en bas de la fenêtre de collecte des données et ressemble à ceci :

Output Format	Output Type
CSV	As File
Default	
Submit	

Définissez le format d'export souhaité, puis cliquez sur le bouton « Soumettre ».

Exporter toute la table

Pour exporter plusieurs fichiers, commencez par filtrer la table pour n'afficher que les validations à exporter.

⚠️ Important

Attention : cette action exportera toutes les validations visibles dans la **table entière**.

Ensuite, cliquez sur le bouton `Exporter la sélection` en bas de la page. Une fenêtre apparaîtra pour choisir le format et confirmer avec le bouton `Ok`.

Tous les fichiers seront exportés dans un dossier compressé `.zip`.

Amélioration du flux de travail

Dans cette partie, nous allons aborder deux fonctionnalités principales du système qui permettent d'améliorer vos workflows.

Utilisation des indicateurs (flags)

Notre système utilise des indicateurs pour définir l'état d'une validation. Chaque indicateur est associé à une icône et apparaît sous la zone fournisseur dans le document. Exemple :

Show	10	entries
#	Supplier	
2	Some other company	 

Comment utiliser les indicateurs

Les indicateurs permettent aux utilisateurs de comprendre rapidement l'état d'une validation existante. Ils aident aussi à savoir si une tâche a déjà été effectuée.

Exemples d'indicateurs courants :

- Payé
- Vérifié
- etc.

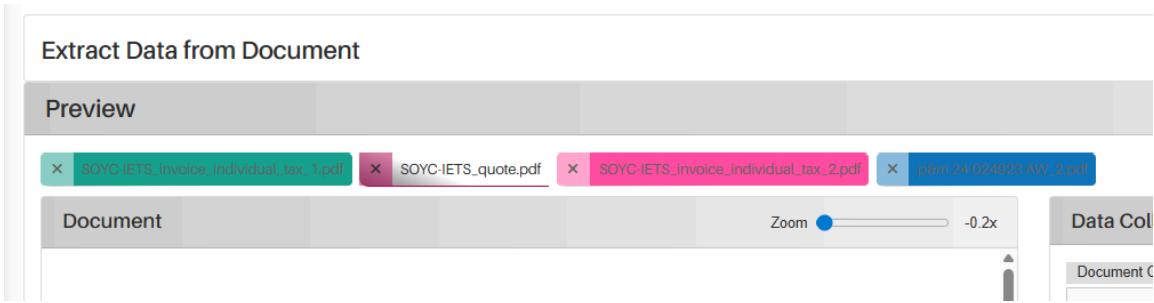
Revue rapide de plusieurs documents

Notre système permet également de sélectionner plusieurs documents pour les revoir rapidement, améliorant ainsi l'efficacité du workflow.

Sélectionnez les documents souhaités, puis cliquez sur le bouton de visualisation représenté par cette icône :



Après avoir cliqué, vous serez redirigé vers une page de visualisation similaire à celle d'un seul document, mais avec plusieurs onglets en haut, représentant chaque fichier. Exemple :



Chaque onglet est coloré en fonction de l'état du document (mêmes couleurs que dans la table des validations).

Vous pouvez ainsi rapidement parcourir tous les fichiers sans revenir à la page principale.



System Overview-Users

Français

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Version: v1.0

Utilisateurs

Quel est l'objectif principal

Dans cette page, vous pourrez contrôler et surveiller tous les utilisateurs ayant accès à votre système et à vos données.

C'est également ici que vous pourrez ajouter ou supprimer des utilisateurs de votre système.

Prérequis

Avant de commencer à gérer ou à ajouter des utilisateurs à votre système, nous vous recommandons de définir tous les rôles existants ainsi que les droits associés à chaque type d'utilisateur.

Aperçu

Guide Administrateur

Dans cette section, vous trouverez toutes les informations techniques et critiques concernant la gestion des utilisateurs de notre système.

Importance du nom d'utilisateur et de l'adresse e-mail

Extractional accorde une grande importance au nom d'utilisateur et surtout à l'adresse e-mail.

Dans notre système, chaque adresse e-mail doit être unique pour chaque utilisateur.

Assurez-vous donc que chaque e-mail ne soit utilisé qu'une seule fois pendant toute la durée de vie du logiciel.

Cette durée de vie inclut également les **utilisateurs supprimés**.

Comment notre système gère les utilisateurs supprimés

Dans notre système, nous ne supprimons jamais complètement un utilisateur.

La raison est de conserver les enregistrements de toutes les validations traitées par chaque utilisateur.

En gardant toujours les informations de l'utilisateur, vous pourrez identifier la personne assignée à chaque validation.

Important

Nous recommandons de ne mettre l'utilisateur qu'en `inactif` si vous n'êtes pas encore certain de devoir le réutiliser.

Tous les utilisateurs `inactifs` ne pourront pas entrer dans le système.

Caractéristiques des utilisateurs

Il existe deux types principaux de caractéristiques utilisateur : celles servant uniquement à identifier l'utilisateur et celles qui définissent ses droits d'accès et d'utilisation du système.

Ici, nous nous concentrerons que sur les caractéristiques ayant un impact sur l'utilisation du système.

Statut

Indique l'état actuel du compte ou de la session d'un utilisateur.

Notre système prévoit les statuts suivants :

- `Actif` Le compte est pleinement fonctionnel et a accès à toutes les fonctionnalités.
- `Inactif` Le compte est désactivé. L'utilisateur ne peut pas se connecter tant qu'il n'est pas réactivé.
- `Confirmer le mot de passe` L'utilisateur doit confirmer ou réinitialiser son mot de passe avant d'accéder au système.
- `Paiement requis` Le compte est restreint temporairement jusqu'au règlement des paiements en attente.

Selon le statut, l'utilisateur pourra ou non accéder au système.

De plus, le système peut modifier automatiquement le statut.

Avec les droits nécessaires, vous pouvez également changer un utilisateur **ACTIF** en **INACTIF** pour lui retirer l'accès.

Rôle

Le rôle définit ce que l'utilisateur peut manipuler/visualiser dans le système.

Notre système comporte quatre rôles prédéfinis : Superutilisateur, Admin, Créeateur et Validateur.

Vous pouvez toutefois créer de nouveaux rôles et définir leurs droits spécifiques.

Plus d'informations sur la définition des rôles sont disponibles dans la documentation associée.

Aperçu des principales fonctionnalités

Dans cette section, vous trouverez une explication sur l'utilisation de chaque fonctionnalité de cette page.

Important

Veuillez noter que seuls les utilisateurs disposant des droits adéquats peuvent créer ou modifier des utilisateurs.

Ajouter un nouveau utilisateur dans le système

Pour ajouter un utilisateur, allez d'abord sur la page principale des utilisateurs.

Si vous n'y êtes pas, cliquez sur le champ `Utilisateurs` dans la barre de navigation, puis à nouveau sur `Utilisateurs`.

Sur la bonne page, cliquez sur l'icône plus en bas de la page pour déclencher l'ajout.

Voici à quoi ressemble cette icône :



Vous serez redirigé vers un formulaire à remplir avec les informations du nouvel utilisateur.

Une fois complété, cliquez sur `Soumettre` au bas de la page.

Un lien d'invitation sera envoyé à l'adresse e-mail du nouvel utilisateur.

Accepter l'invitation

FONCTIONNALITÉ ENCORE EN TEST, actuellement aucune invitation n'est envoyée

Modifier les informations d'un utilisateur

Trouvez l'utilisateur concerné et cliquez sur l'icône d'édition :



Vous accéderez alors au formulaire de modification contenant toutes ses informations.

Vous pouvez changer manuellement ou sélectionner une option (selon le champ).

Pour enregistrer, cliquez sur **Soumettre**.

Pour annuler, utilisez le bouton retour en bas de la page.

Supprimer un utilisateur

⚠️ Important

Attention, une suppression est définitive !

Si vous souhaitez simplement retirer l'accès d'un utilisateur sans supprimer ses données, il est préférable de changer son **Statut**.

Pour supprimer un utilisateur, cliquez sur l'icône de suppression présente à côté de son profil et confirmez.

L'icône ressemble à :



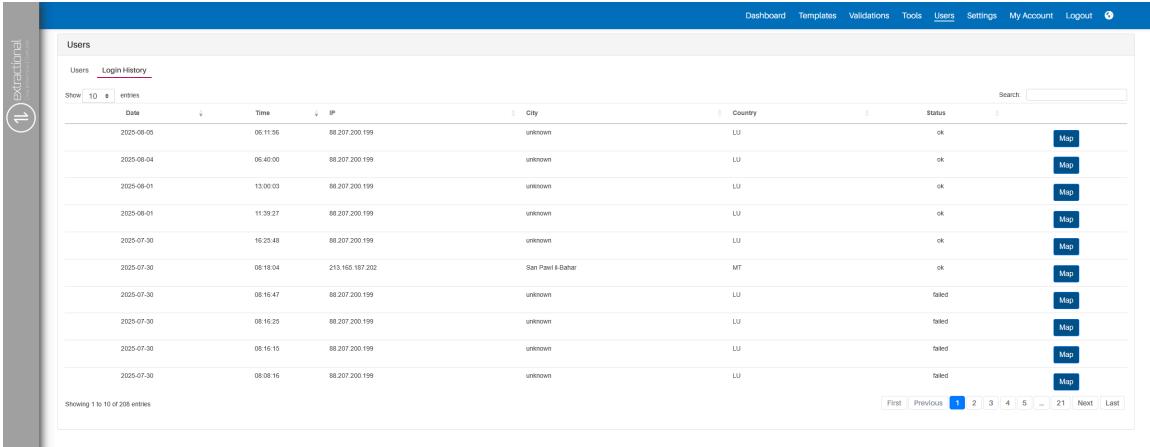
Consulter l'historique de connexion des utilisateurs

Vous pouvez également consulter l'historique des connexions afin de vérifier les accès au système.

Cliquez sur l'onglet **Historique des connexions** en haut de la page principale des utilisateurs.

The screenshot shows a user interface for managing users. At the top, there is a header with the word "Users". Below the header, there are two tabs: "Users" and "Login History". A large black arrow points downwards from the "Users" header towards the "Login History" tab, indicating that it is the active or intended section to be selected.

Vous accéderez à une page affichant l'historique complet, comme ci-dessous :



The screenshot shows the Extractional software interface with a dark blue header bar. The header contains the following navigation items from left to right: Dashboard, Templates, Validations, Tools, **Users**, Settings, My Account, Logout, and a help icon. On the far left, there is a vertical sidebar with the 'extractional' logo and a circular icon containing a stylized letter 'E'. The main content area has a light gray background and features a table titled 'Login History'. The table has columns: Date, Time, IP, City, Country, Status, and a 'Map' button. The data in the table is as follows:

Date	Time	IP	City	Country	Status	
2025-08-05	06:11:56	88.207.200.199	unknown	LU	ok	<button>Map</button>
2025-08-04	06:40:00	88.207.200.199	unknown	LU	ok	<button>Map</button>
2025-08-01	13:00:03	88.207.200.199	unknown	LU	ok	<button>Map</button>
2025-08-01	11:39:27	88.207.200.199	unknown	LU	ok	<button>Map</button>
2025-07-30	16:25:48	88.207.200.199	unknown	LU	ok	<button>Map</button>
2025-07-30	08:18:04	213.160.187.202	San Salvador	MT	ok	<button>Map</button>
2025-07-30	08:16:47	88.207.200.199	unknown	LU	failed	<button>Map</button>
2025-07-30	08:16:25	88.207.200.199	unknown	LU	failed	<button>Map</button>
2025-07-30	08:16:15	88.207.200.199	unknown	LU	failed	<button>Map</button>
2025-07-30	08:08:16	88.207.200.199	unknown	LU	failed	<button>Map</button>

Showing 1 to 10 of 208 entries

At the bottom right of the table, there is a navigation bar with buttons for First, Previous, Next, and Last. The page number '1' is highlighted in blue.

Cette page montre toutes les tentatives de connexion ainsi que des informations supplémentaires (ville, pays, statut, etc.).



System Overview-Settings

Français

© 2025 Extractional · v1.0

Version: v0.1

Settings

Annonce importante

Cette page est encore en cours de traduction dans votre langue. Pour le moment, vous pouvez utiliser cette page en anglais.

What is the main Purpose

In this part of this system, you will be able to define the major behaviour of your system. It is also where you shall define all of your templates, roles, etc. It is highly recommended that you go through the settings page and define everything that your system shall need before you put this system into use in your company.

The system settings are separated into several subpages. To decrease the complexity of the explanation of the several subpages, we have divided each subpage into it's own section in our user manual.

Overview

The screenshot shows the Extractional web application interface. The top navigation bar includes links for Dashboard, Templates, Validations, Tools, Users, Settings (which is underlined to indicate it's the active page), My Account, Logout, and a help icon. On the left, a vertical sidebar menu lists various settings categories: License, Company Data, Document Settings, Export, User Roles, IMAP Monitoring, Outgoing Emails, Languages, Currencies, PEPPOL, Google Keys, and System Settings (which is highlighted with a blue background). Below this are buttons for Export Settings and Import Settings. The main content area is titled "System Settings" and contains a "Session Timeout" dropdown set to "4 Hours". A note below the dropdown states: "This does not affect current sessions, only new sessions will be configured using this value". At the bottom of the content area is a "Submit" button.

License

In this first subpage you can find all the information about the current license that your system is currently using. Additionally you can also change some of the parameters such as if you would like to activate the auto renewal system or not.

Buying or changing your license

If you would like to buy or change the license of your system, you must enter this page in order to do it.

Once you have entered this page, you will need to click on the **Buy/Change License** button that is positioned at the bottom right corner of the page. A representation of the button can be seen below this sentence.

Buy/Change License

Once you have clicked on this button, you will be redirected to another page where you will be able to choose the plan that you like to buy or renew.

Company Data

In this subpage, you will define all of your company's data. It is in this subpage where you shall add and modify all of your company's bank account(s) information.

Overview

The screenshot shows the Extractional software's settings interface. On the left, a sidebar titled 'extractional' contains a 'Settings' menu with various options like License, Company Data, Document Settings, Export, User Roles, IMAP Monitoring, Outgoing Emails, Languages, Currencies, PEPPOL, Google Keys, and System Settings. The 'Company Data' option is currently selected and highlighted in blue. The main content area is titled 'Company Data' and contains several input fields: 'Company Name' (set to 'Krebs PBV GmbH & Co KG'), 'Address' (set to 'Friedrichstraße'), 'House Number / Building' (set to '34'), 'Postcode' (set to '54516'), 'City' (set to 'Wittlich'), 'Country' (set to 'Germany' with a dropdown arrow), and 'Contact Name' (set to 'Hans Krahe').

Making some changes to the company(s) information

If you would like to add or change any data related to your company's information, you shall change it by simply clicking in the respective fields that you would like to change the information. You will then have the possibility to change the data by typing the new values or simply selecting one of the options possible, this will depend on the field that you would like to change.

Once you have made all of your changes, you will simply need to submit your changes by clicking on the submit button on the bottom of the page.

Changes in the Bank information subpage

If you would like to modify one of your company account(s) or add/remove one, you shall do it in the Bank information tile that is shown at the bottom of the page.

The screenshot shows the 'Bank Information' subpage. It features a form with the following fields: 'Account' (Bank Name: 'VOLKS BANK HUNSRIECK-NAHE EG'), 'Account Holder' (Krebs PBV GmbH & Co KG), 'Account Alias', 'IBAN' (DE10560614720007248244), 'BIC' (GENODED1KKK), and 'Currency' (EUR). At the bottom left of the form is a blue circular button with a white plus sign (+).

Modifying an existing account

To modify an existing account, you will simply need to do the same manipulation as before (to change the company's information) in the desired field(s) time.

Once all changes have been made, you will only need to click on the `Submit` button in order to save your changes.\

Adding a new account

In order to add a new account into the system, you will need to click on the plus icon that is shown on the bottom of the account's page. Once you have clicked on the plus icon, a new account representation tile will pop-out, and you will have the possibility to add all the information of this new account that you would like to add.

Once you have entered all the information for the new account, you will only need to click on the `Submit` button to save your changes.

Deleting an existing account

If you would like to remove an existing account, you can do so by clicking on the trash bin icon of the respective account, and the account will be removed. The trash bin icon can be found on the top right corner of the respective account representative tile.

Document Settings

Analysis Fields

In this subpage of Settings, you can define all the data that shall be extracted from each type of document that is being read.

Overview

How to navigate and define all fields

Firstly, to navigate through the system, use the different tabs that can be found at the top of the page. These different tabs allow one to navigate between each type of document will be defined for extraction.

Visualizing all elements that are being extracted

To visualize all the elements that are currently being extracted from the system, you can do so by analysing all the elements that do have the select box selected. To help you visualize what a selected element is, you can find a visualization of an element that is being extracted in the system.



Understanding the field's definition

To understand how a certain field extraction unit has been defined, you will need to understand what each category that defines a field abstraction is.

Each field has the following elements:

General field name

The **general field name** will define the name that you will see in the system's graphical user interface. This name is defined in each language of the program.

Output name

The **output name** is the technical name that will be used further on to create XML relations and to implement on further templates or automations. This name must be unique and must be single-worded.

Field format

The **field format** defines the format of this entity with regular expressions. It is in this case where you will be able to define the length of each field as well as define the type of input the field shall always receive (words, numbers, etc.).

Default

The **default** case is where you are able to define a default value for your entity in case if the system does not find any value.

Type

In the **type** case you can define how this input shall be identified in our system. For example, if you would like that our system identifies these entities as data, here you shall define it.

Decimals

In case you are dealing with numbers, you will also be able to define how many decimal numbers are allowed in the system. This can be easily defined in the **decimals** box. Additionally, if our system receives as an input a number with more decimals than what you have defined, the system will automatically round the number to the number of decimals allowed.

Selective options

For the selective option, you will be able to define if this field shall be included in filters, meaning that if selected, you can use it when filtering. You will also be able to define if you allow type-in, in other words, allowing to use that manual selections can also be applied for that field. Moreover, you will also be able to define if that field is required or not, meaning that once a field is required, it cannot be left blank.

Now that you understand the definition of a certain field, you can now define all the fields that your system shall extract, and if none of the fields corresponds to what you would like to extract in the documents, you can always create more fields by clicking on the plus icon at the bottom of the table.

Difference between the two tables

There are two tables where you can define your fields. It is important to define your fields in the correct table. We will now explain what each table means.

1 First table

In the first table, you define all the fields that the system will extract from each document. Generally, here you shall define all the different fields that are more general for the whole document, such as the client name or the total sum to pay.

2 second table

In the second table, you shall define all the different fields that are specific for generating Peppol compliant data. In other words, you shall only define all the fields that you want in your table of items of products in the document.

Document Tables

In this subpage of the settings you will be able to define what you would like to have visible in the document table the is situated in the Validations page.

In this page you will be able to define how each one(s) document page would look like.

Overview

The screenshot shows the 'Document Table Columns' configuration page. On the left, there's a sidebar with navigation links: Settings, Licenses, Document Data, Document Settings, Analysis Fields, Document Tables (which is selected), Document Flags, Currencies, User Roles, IMAP Monitoring, Outgoing Emails, Languages, Currencies (selected), PEPPOL, Google Keys, and System Settings. Below these are Export Settings and Import Settings. At the top right, there are links for Dashboard, Templates, Validations, Tools, Users, Settings, My Account, and Logout. The main area is titled 'Document Table Columns' and shows a table with columns for 'Name', 'Column Mode', 'Column Alignment', 'Searchable', and 'Sortable'. The table lists various document fields with their current settings. For example, 'Supplier' is set to 'Enabled' with 'Left' alignment, while 'Supplier ID' is set to 'Enabled' with 'Centered' alignment. The table continues with fields like 'Document Category', 'Date', 'Invoice Number', 'Release Date', 'Released By', 'Responsible', 'Delivery Date', 'order_confirmation_number', 'order_confirmation_data', 'Supplier Address', 'Supplier Email', 'Supplier Phone', 'Supplier Fax', 'Supplier Tax Number', 'Supplier VAT Number', 'Invoice Date', 'Invoice Currency', 'Order Number', 'Delivery Number', 'Customer Number', 'Customer Tax ID', 'Our Contact Number', 'Project Manager', 'Sum (net)', 'Sum (gross)', 'VAT', and 'Skonto_Percent'.

How to interact in this page

As you can see, this page is composed of a table full with all information that will be extracted in the system. In each one of the fields, you will be able to choose how it shall be visible in the documents page. We will now explain what each column actually does.



Note

Some of the fields are already predefined and you will not be able to make any changes in it.

Column Mode

In this column you will be able to define what the visibility for each field. You have three options:

- Disabled: this field will not appear at all in the table and will not be chosen as a search criteria when searching for a file.
- Hidden: this field will not appear at all in the table, but it will be considered when searching for a file in the search bar.
- Enabled: this field will appear in the table of documents and will also be considered when searching for a file in the search bar.

Column alignment

In the following column, you can specify how each file should be aligned in the table.



Note

You only need to define this column if you have defined the `Column mode` as **Enabled**.

You can choose between the following options:

- Left alignment
- Centered alignment
- Right alignment

Selective columns

Note

There are two selective columns for each one of the fields. These shall only be put into consideration once the `Column mode` is set to **Enabled**.

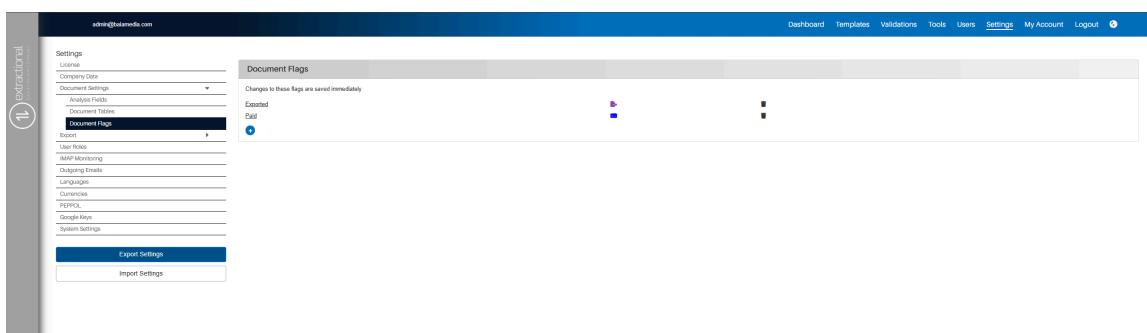
The **Searchable** selective column allows you to define whether the field is considered when searching for a document in the search bar.

The **Sortable** selective column allows you to define whether the field can be used to sort the document's list or not.

Document Flags

In the following page, you will be able to define and modify all of your document flags.

Overview

A screenshot of the Extractional software interface showing the 'Document Flags' page. The top navigation bar includes links for Dashboard, Templates, Validations, Tools, Users, Settings, My Account, and Logout. On the left, there is a sidebar with various settings categories like License, Company Data, Document Settings, Analysis Fields, and Document Types. The main content area is titled 'Document Flags' and contains a table with two rows. The first row has 'Exported' checked and 'Edited' checked. The second row has 'Exported' checked and 'Edited' unchecked. There are icons for edit, delete, and refresh next to each row. At the bottom of the table are buttons for 'Export Settings' and 'Import Settings'.

Understanding the page layout

This page represents all the document's flags in a table. In this table, each flag is represented in a row. Modifying, creating new flags, or deleting existing flags can be done by clicking on several buttons or icons. Each functionality shall now be explained in the following sections.

Modifying the current flag(s) list

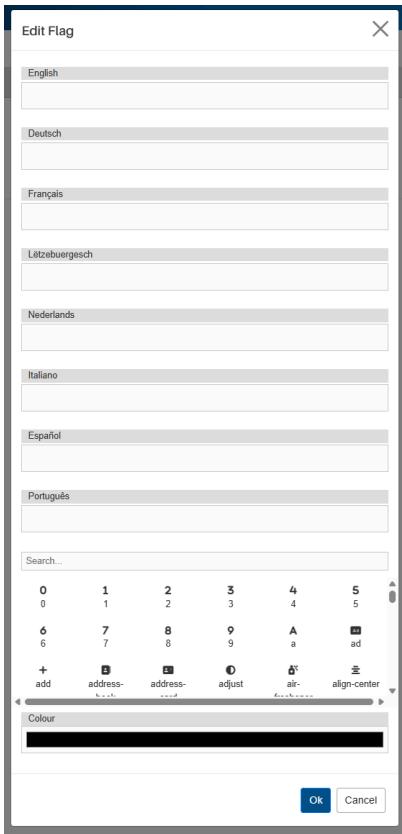
In this part, you will learn to modify your current company(s) flag list.

Note

If you would like to change or add flag automation together with exportation, you shall define it in the [export page](#).

Adding a new flag

In order to add new flag into the system, you will need to firstly click on the plus icon that can be found on the bottom of the page. Once clicked, you shall be represented with the following window.



You will now need to insert the name of the new flag in all the corresponding languages as well as defining a corresponding icon with the respective color.

Once you have defined all the different fields, click on the `Ok` button at the bottom of this window. If the manipulation has been successful, you shall be able to see the new flag in the flag(s) list.

Editing an existing flag

If you would like to modify an(some) element(s) of an existing flag, you will need to click on the flags name that you would like to modify in the respective list.

Once clicked, you will be represented with the same window as for creating a new flag but this time with all the selected flag's information. You can now modify all the desired information in the respective fields.

Once all the modifications have been made, you will need to click on the `Ok` button at the bottom of the page and all the changes will be saved in the system.

Deleting an existing flag

In order to delete an existing flag, you will need to click on the delete icon of the respective Document. This icon can be found at the end of each document flag.

Once clicked on the desired flag, the flag will be successfully removed from the system.

Export

Default export Values

In this page, you can define the default values in the system's export menu.

Overview

The screenshot shows the 'Default Values' page under the 'Export' section of the settings. The 'Output Format' dropdown is set to 'CSV'. The 'Output Type' dropdown is set to 'As File'. There is a 'Submit' button at the bottom.

Defining the new default values

If you would like to change the default values for exportation, you will need to simply select the desired values in this page and click on the `Submit` button at the bottom of the page.

Export CSV Templates

This page is responsible for defining all the different CSV templates available in the system.

Overview

The screenshot shows the 'CSV Templates' page under the 'Export' section of the settings. The table lists CSV templates with their corresponding document types and default status. A search bar and pagination controls are at the bottom.

Name	Document Type	Is Default
Default	Credit Note	<input checked="" type="checkbox"/>
Default	Delivery Note	<input checked="" type="checkbox"/>
New Template 1	Invoice	<input checked="" type="checkbox"/>
Default	Order Confirmation	<input type="radio"/>
Default	Order Form	<input checked="" type="checkbox"/>

Navigating through the page

This page follows a similar layout to the validations page. Each template is represented in the table as a row. You will be able to define how many templates you would like to have per page in the respective selective field. You can change between pages on the navigation buttons.

You can also look for a specific template by typing its name or document type in the search bar.

Adding a new template

In this part, you shall find a guide on how to add a new CSV template from scratch.

Start

The first thing to do will be to click on the \"Add...\" button at the bottom of this page to trigger the system that you would like to add a new template.

Once clicked, you shall be presented with the following additional information on the page.

The screenshot shows a configuration dialog for a new CSV template. At the top, there are fields for 'Name' (set to 'New Template 2') and 'Document Type' (set to 'Invoice'). Below these are several sections: 'Set flags after export automatically' (with 'Exported' checked), 'Number Format' (with four radio button options for different number formats), 'Data Format' (with a checked checkbox for '2016-12-31' and other date/time format options), and 'CSV Columns' (with a 'Add...' button). At the bottom are 'Submit' and 'Cancel' buttons.

You will now need to define all the general characteristics of the new template. Once you have defined all the different general characteristics of the new template (Name, Document type, Set flags after export, Number format), you will need to add all the columns for exportation.

Defining all columns

All the different columns of a certain CSV template are available in the `CSV Columns` tile at the bottom of the page. In order to add a new column into the system, you will need to click on `Add...` button and you should be presented a new column entity.

The screenshot shows a 'CSV Columns' tile with a single column entry. The 'Field' is set to 'accounting_cost'. The 'Shown in output as' field also contains 'accounting_cost'. A trash icon is visible to the right of the entry.

You will not be able to define the field value that shall be inserted in that column as well as to define the columns name.

In addition, you will be able to change the order of the columns by grabbing (left clicking on the field) the field that you would like to move and placing it where you would like.

Submitting the new template

Once all the information has been added to this new template, you need to click on the `Submit` button at the bottom of the page to save this new template in the system.

Editing an existing template

In order to change an existing template, you will need to start by clicking on the edit button of the respective template.

The system will then display all relevant details for that specific template using the same layout as when creating a new template.

You will now be able to change all the different characteristics of that template as well as changing all the different columns of that template. The columns manipulation will work in the same way as when creating a new template.

Additional features

Editing templates

In order to remove one of the templates, you will need to click on the `delete` icon that is visible at the right side of each template. After clicking on the remove icon, the template will be successfully removed.

Defining default templates

You can also define all default templates for each type of document (Invoice, Credit Note, etc.). To do so, you will need to select, in the `is default` column the template that you would like to have as default. The previously default template for that type of document will be automatically unselected.

Export JSON

In this page, you will be able to define all automations with flags for all JSON exportations.

Overview

A screenshot of the Extractional software interface. The left sidebar shows navigation options like Settings, Licenses, Company Data, Document Settings, Export, Default Values, CSV Templates, XML Templates, PEPPOL, ZUGFeRD, User Roles, IMAP Monitoring, Outgoing Emails, Languages, Currencies, PEPPON, Google Keys, and System Settings. The main panel is titled 'JSON' and contains a section 'Set flags after export automatically' with checkboxes for 'Exported' (checked) and 'PDF' (unchecked). The top right includes links for Dashboard, Templates, Validations, Tools, Users, Settings, My Account, and Logout.

Setting flags after exportation

You can automate the system to automatically set a(some) flags to a certain document once it has been exported as a JSON file. This can be done by simply selecting the flags that you like to be added once a document has been exported as a JSON file.

Export - XML Templates

On this page, you can define all the XML templates available in the system. Navigation works in the same way as on the **Export -- CSV Templates** page, with the main difference being the **Template Data** section, which appears when editing an existing template or creating a new one.

Template Data

In this section of the page you will be able to define the main template format and items that shall be used for exportation afterwards. The template shall be written in XML and if you would like to refer to one of the system's fields, you shall use the following notation `\@some_field@`

There are three main templates that shall be defined:

"Main" XML template

defining all information that shall be released regarding the main content of the document.

XML template for line items

defining all the information that shall be released regarding each item of the document. This part will only be activated if you are exporting an **Peppol compliant** document.

XML template for payments

defining all the information that shall be released for XML payments (typically SEPA transaction XML files).

Export PEPPOL/ZUGFeRD

On these pages, you can define all flag-based automations for PEPPOL/ZUGFeRD exports. The layout and navigation are identical to the **Export -- JSON** page. For a more detailed explanation of how these pages work, refer to [the corresponding section](#) of this manual.

User Roles

In this page, you will be able to define all the different User roles that you would like to have in your system, as well as defining the permissions for each one of the users.

Overview

The screenshot shows a dashboard with a sidebar on the left containing navigation links such as Company Data, Document Settings, Export, User Roles (which is selected), IMAP Monitoring, Configuration Items, Languages, Currencies, PEPPOL, Google Keys, and System Settings. Below these are Export Settings and Import Settings. The main area is divided into four sections: **Supervisor**, **Admin**, **Creator**, and **Validator**. Each section contains a list of permissions with checkboxes. In the Supervisor section, checkboxes are checked for Create Templates, Read Templates, and Read Validations. In the Admin section, checkboxes are checked for Create Templates, Read Templates, Read Validations, and a 'Limited to user account' checkbox. In the Creator section, checkboxes are checked for Create Templates, Read Templates, Read Validations, and a 'Limited to user account' checkbox. In the Validator section, checkboxes are checked for Create Templates, Read Templates, and Read Validations.

Navigation through the page

On this page, you will find a set of tiles, each representing a user role. Inside each tile, you can see all available permissions in the system, along with the corresponding selection boxes. The selected options indicate the permissions currently assigned to that specific user role.

General manipulations

+ Add a new user role

To add a new user role in the system, click the "New..." button located at the bottom of the page. A window will appear, prompting you to enter the name of the new user role in each language supported by the system. Once completed, click the "Submit" button to confirm.

Changing permissions of a user role

To define or modify the permissions of an existing user role, simply select or deselect the relevant permission(s). After making your changes, click the "Submit" button at the bottom of the page to save them.

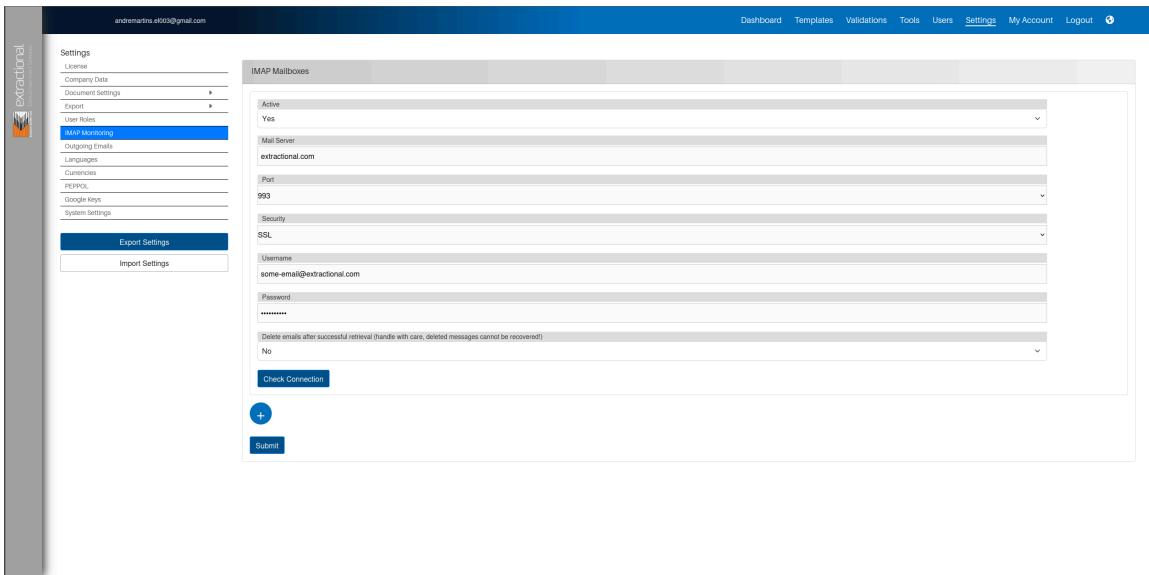
Renaming user role

To rename an existing user role, click the edit button in the top-right corner of the corresponding role's tile. A new window will open, allowing you to update the role's name in each language. When finished, click the "Submit" button at the bottom of this window to save the changes.

IMAP Monitoring

In this page, you will be able to define the IMAP connection with your email(s) so that all the documents that will be received in your email will be directly inserted into the system.

Overview



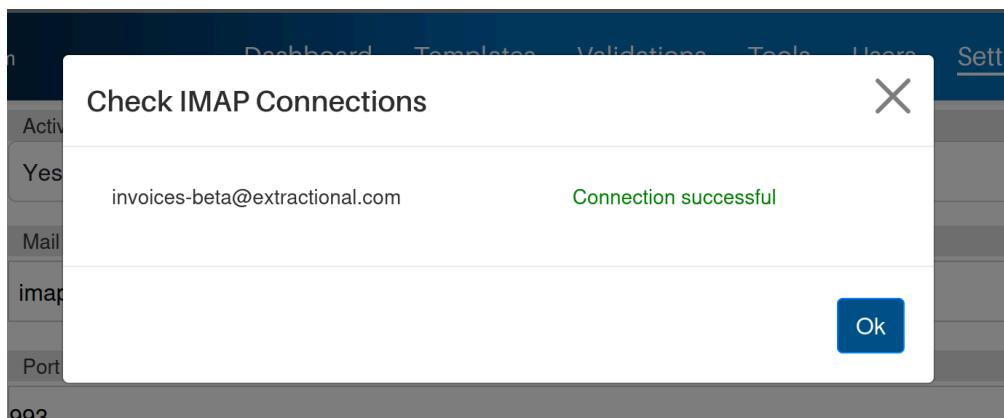
How to set a new e-mail in the system

⚠️ Important

This part will highly depend on your email domain. If your domain allows IMAP connection with no additional authentication, please follow the first part of this section. If, however, your system needs additional OAuth authentication, please follow the second part of this section.

1. Adding an email with simple IMAP connection

For a simple IMAP connection you shall simply enter all of your e-mail's coordinates, such as mail server and. You also need to enter all your email and password.\ Once entered all of your credentials, you will need to define weather you would like all e-mails to be automatically deleted or not. This shall be handled with care since deleted email messages cannot be recovered.\ You can now check if your system succeeds connection by clicking on the \"Check Connection\" button, and a new window will pop-out showing you the respective result.



Example when connection is successful

 **Info**



Once your email has been successfully added, you will need to click on the `Submit` button at the bottom of the page and your changes will be saved.

2. Adding an e-mail with OAuth connections



Note

Currently, our system only allows OAuth connection with Outlook emails, any other domains that need this type of connection will not work in our system unfortunately.

The first step will be to trigger the system to create such a connection. To do so, you will need to enter the mail server and deselect the box, meaning, for example, right-clicking outside the box.

The system will automatically detect if your domain needs OAuth connection and if so, you will need to insert the additional information that is needed for this type of connection.

For **Outlook** accounts you will need to add the following additional information that is listed below.



Microsoft Tenant Id

For more informations, please use the following → [link](#)



Microsoft Application Id

For more informations, please use the following

→ [link](#)



Client Secret key

For more information on how to get this Id, please use the following → [link](#)

You will then need to fill all the rest of the fields as for a simple IMAP connection e-mail and verify your connection as previously explained.

Adding an additional email

If you would like to add an additional account to the system, it is as simple as clicking on the plus icon that can be found at the bottom of the page. Then a new tile for the email entity will be visible on the page.

You can now add all your additional email credentials in the same way that you have inserted for the first account.

Deleting an existing account

Note

You can only remove additional e-mails; the main e-mail (first in the list) cannot be removed.

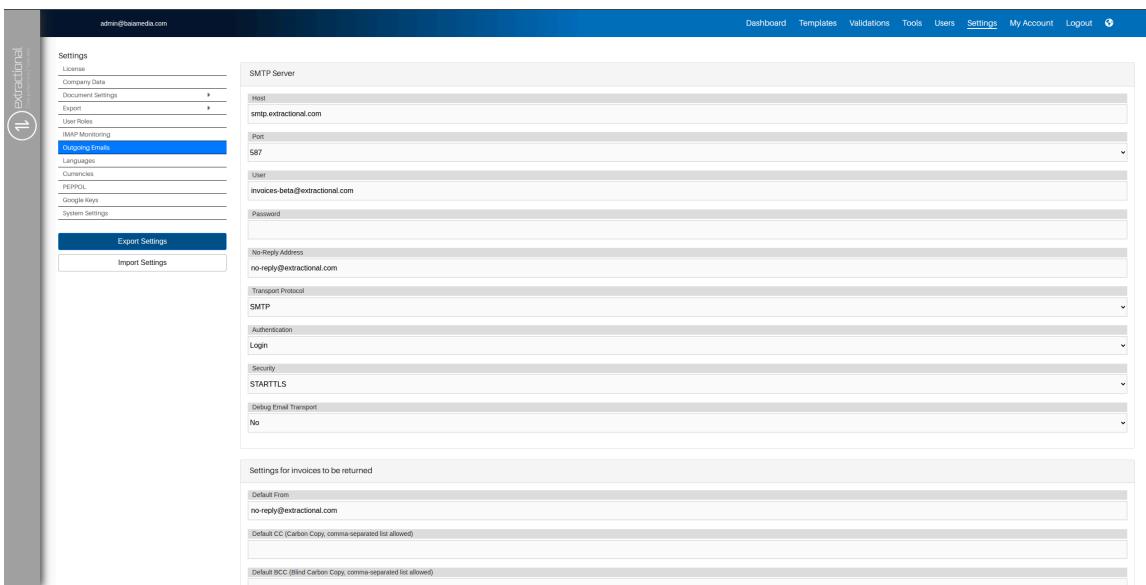
In order to remove an existing e-mail, you shall click on the `remove` icon of the respective email that you would like to remove.

Once your email has been successfully added, you will need to click on the `Submit` button at the bottom of the page and your changes will be saved.

Outgoing Emails

In this page, you can define the email connection for all outgoing e-mails in the system.

Overview



Setting up the email connection

Our system, in order to send emails with a given email, uses a SMTP(S) transport protocol connection.

Prerequisites

In order to realize this connection, you first need to make sure that your email host domain allows you to elaborate such a connection.

If you are currently trying to connect to an professional outlook account, please use the following [paragraph](#) that explains exactly how to establish a connection to a an outlook account.

Filling all your email's credentials

Now that you already know that your e-mail allows this type of connection, you will only need to create fill all the different fields in `SMTP Server` section of the page and your system should have a successful connection with your email.

Please do not forget to save your changes by clicking on the `Submit` button on the bottom of the page.

Outlook connection

Our system also provides the ability to connect your system to an outlook account. In order to trigger the system that you would like to connect to an outlook account, you will need to enter the Outlook's SMTP Server `smtp.office365.com` in the `Host` text field and unselect the respective field.

Once unselected, the system will represent some additional information that needs to be added in order to realise this more complex connection with Outlook's SMTP server.

The additional information that needs to be added is the following:

Microsoft Tenant Id

For more informations, please use the following → [link](#)

Microsoft Application Id

For more informations, please use the following

→ [link](#)

Client Secret key

For more information on how to get this Id, please use the following → [link](#)

Once all the information has been added, you will need to save all the changes by clicking on the `Submit` button at the bottom of the page.

Setting template for all returned invoices

Here, you will be able to define the main composition of the email that will be sent once a document is not accepted.

Filling all fields

The first part here will consist of filling all main fields as if where to send a normal e-mail, such as email sender, CC's, etc.

Creating the default body and subject

Once all the different fields have been completed, you will need to complete a default subject that shall as well as a default body.



Tip

If you would like to have some identifying data, such as the invoice number or the name of the current user, you can always use the following replacing nomenclatures and this will automatically be done for you.

- 0 = Invoice Number
- 1 = Name of current user
- 2 = Email address of current user
- 3 = Text \" or phone \", followed by phone number of current user (will only be inserted if available)

Languages

In here you will be able to define all the languages that you want to be enabled in your system.

Overview

The screenshot shows the Extractional software interface. At the top, there is a navigation bar with links: Dashboard, Templates, Validations, Tools, Users, Settings (which is underlined), My Account, and Logout. On the far right of the top bar, there is a small gear icon. On the left side, there is a vertical sidebar with a logo at the top, followed by a list of settings categories: Licenses, Company Data, Document Settings, Export, User Roles, IMAP Monitoring, Outgoing Emails, Languages (which is highlighted in blue), Currencies, PERPOL, Google Keys, and System Settings. Below the sidebar, there are two buttons: Export Settings and Import Settings. The main content area is titled "Languages". It contains a table with two columns of language checkboxes. The left column includes English, Deutsch, Français, and Österreichisch. The right column includes Nederland, Italiano, Español, and Português. A "Submit" button is located at the bottom of the table.

How to add or remove languages

Here, in order to add or to remove languages from your system, you will deselect or select all the respective languages. This can be done by simply clicking on the selective text boxes that are visible next to each language. All the languages that are selected will be available for usage.

Once you have defined your choice, you will only need to click on the `Submit` that is available at the bottom of the page in order to save your preferences.



Info

Please note that these preferences will be applied to all users, not just to your account.

Currencies

In this page you will be able to define all the conversion rates through in your system, this allowing the system to correctly converting the different currencies in the system.

Overview

The screenshot shows the Extractional software interface with the following details:

- Header:** admin@datamedia.com, Dashboard, Templates, Validations, Tools, Users, Settings (highlighted), My Account, Logout.
- Left Sidebar:** Settings (License, Company Data, Document Settings, Export, User Roles, IMAP Monitoring, Outgoing Emails, Languages, Currencies - highlighted), PEGPOL, Google Keys, System Settings, Export Settings (highlighted), Import Settings.
- Content Area:**
 - Currencies Tab:** API Key for automated exchange rate updates via currencyfreaks.com: [Input Field], Enable automatic update of exchange rates, Update button.
 - Table:** A grid of currency information with columns: Default, Name, Complete Name, Symbol, Exchange rate to EUR, Fraction Digits, and two icons each.

Default	Name	Complete Name	Symbol	Exchange rate to EUR	Fraction Digits		
●	AED	UAE Arab Emir. Dirham	Dir	4.95913	2		
●	ARS	Argentine Peso	\$	5.72939	2		
●	AUD	Australian Dollar	AUS	1.36064	1		
●	BHD	Bahrain Dinar	BHD	0.503172	2		
●	BND	Brunei Dollar	BS	1.73154	2		
●	BRL	Brazilian Real	R\$	2.41666	2		
●	BZD	Belize Dollar	BZ\$	2.6179	2		
●	CAD	Canadian Dollar	CA\$	1.39058	2		
●	CHF	Swiss Franc	Fr	1.23836	2		
●	CLP	Chilean Peso	\$	697.8	0		
●	CNY	Chinese Renminbi	¥	8.5716	0		
●	CZK	Czech Koruna	Kč	25.4994	1		
●	DKK	Danish Krone	kr	7.44149	1		
●	EEK	Estonian Kroon	KR	15.8592	1		
●	EGP	Egyptian Pound	£	8.02551	1		

Navigation through this page

This page is composed of a window where you can establish a connection with the **currencyfreaks.com** API. You will also be able to define if you would like the to have the table updating automatically as well as manually update it.

How to use this page

In this section you will be able to learn how to use this page.

Adding an API key

Adding an API key from **currencyfreaks.com** will allow you to enable the concurrency interchange rate to automatically update with the press of a button or even by scheduling the update.

Where to find the API key

In order to create a new API key you will need to create an account at the [currencyfreaks website](#) and choose the plan that you would like to use (typically the free plan shall be more

than enough for your needs).

Once the account is prepared, you will be able to generate API keys.

How to add it in our system

Now that you have one key, you only need to add it to the respective text field and click on the `submit` button.

Updating the exchange rate table

In order to automatically update the rate table you will need to have an API key defined.

Scheduling the table updates

In order to schedule all updates, you will need to start by selecting the respective box that is positioned above the `Submit` button. You will be then presented with the following additional information:

Enable automatic update of exchange rates
Schedule update at: Every first day of the month
Updates are scheduled at midnight

You will then be able to define the frequency of the updates. All the updates are always realized at **midnight**.

Once you have saved your preferences, you will need to click on the `Submit` button.

Using the exchange rate table

The navigation through the table is similar to all other tables in the system.

Defining the default currency in your system

In order to define the default currency in your system you shall do it in the `Default` column.

The current default currency is defined with the green color. To define another one, you will need to click on the respective red dot.

Adding a new currency

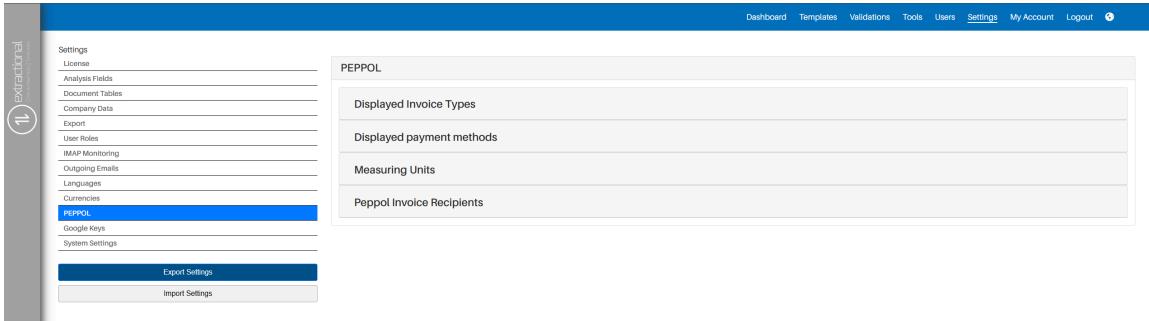
In order to add a new currency in your system, you shall click on the `Add...` button at the bottom of the table and fill all the requested fields in that would be asked.

In this subpage of the Settings page, you shall find all the PEPPOL specific settings.

i Info

You will only need to use this page if you are would like to take advantage of all Peppol-compliant documents features.

Overview



As you can see, there are four main menus that you can choose on this page. In the following sections, you shall find the respective guides on how to take advantage of each section.

How to use all the different menus

Displayed Invoices Types menu

The first menu that we will show will be the menu about where you will define all the types of Invoices that your company may use according to the Peppol standards.

To open this menu, click on the text field \"Displayed Invoice Types\", and your page should look something like this.

The screenshot shows the Extractional software's configuration interface. On the left, a vertical sidebar lists various system settings like License, Company Data, and PEPPOL. The PEPPOL section is currently active. The main content area is titled "PEPPOL" and "Displayed Invoice Types". It contains a large list of document types, each with a checkbox. Most checkboxes are checked, indicating they are selected by default.

Document Type	Description
Tax notification	Used to specify that the message is a tax notification.
Purchase Order	Document message issued within an enterprise to initiate the purchase of articles, materials or services required for the production or manufacture of goods to be offered for sale or otherwise supplied to customers.
Final payment request based on completion of work	The final payment request or a series of payment requests submitted upon completion of all the work.
Payment request for completed units	A request for payment for completed units.
Order	Document message to request of which a buyer initiates a transaction with a seller involving the supply of goods or services as specified, according to conditions set out in an offer or otherwise known to the buyer.
Blanket order	Document message for general order purposes with later split into quantities and delivery dates and maybe delivery locations.
Call off order	Document message to provide split quantities and delivery dates referring to a previous blanket order.
Consignment order	Order to deliver goods into stock with agreement on payment when goods are sold out of the stock.
Commercial invoice	Document message which includes a packing list. Commercial invoice (Invoice) will include a packing list.
Credit note	Document message for providing credit information to the relevant party.
Commission note	Document message in which a seller specifies the amount of commission, the percentage of the invoice amount, or some other basis for the calculation of the commission to which a dealer, agent, or reseller.
Debit note	Document message for providing debit information to the relevant party.
Prepayment invoice	An invoice to pay amounts for goods and services in advance; these amounts will be deducted from the final invoice.
Tax invoice	An invoice for tax purposes.
Intermediate handling cross docking order	An order requesting the supply of products which will be moved across a dock, de-consolidated and re-consolidated according to the final delivery location.
Forwarder's credit note	Document message for providing credit information to the relevant party.
Forwarder's invoice discrepancy report	Document message reporting invoice discrepancies identified by the forwarder.
Insurer's invoice	Document message issued by an insurer specifying the cost of an insurance which has been effected and claiming payment therefore.
Forwarder's invoice	Invoice issued by a freight forwarder specifying services rendered and costs incurred and claiming payment therefore.
Request for payment	Document message issued by a creditor to a debtor to request payment of one or more invoices paid.
Freight invoice	Document message issued by a transport operator specifying freight costs and charges incurred for a transport operation and stating conditions of payment.
Credit note related to goods or services	Debt information related to a transaction for goods or services to the relevant party.
Credit note related to goods or services	Document message used to provide credit information related to a transaction for goods or services to the relevant party.
Claim notification	Document message used to provide credit information related to a transaction for goods or services to the relevant party.
Material services invoice	Document message claiming payment for the supply of rendered services (e.g., gas, electricity, etc.) supplied to a fixed meter whose consumption is measured over a period of time.
Credit note related to financial adjustments	Debt information for providing credit information related to financial adjustments to the relevant party, e.g., bonuses.
Debt note related to financial adjustments	Document message for providing debt information related to financial adjustments to the relevant party.
Consular invoice	Document message to be prepared by an exporter in his country and presented to a diplomatic representative of the importing country for endorsement and returned to be presented by the importer in connection with the import of the goods described therein.
Partial construction invoice	Partial invoice in the context of a specific construction project.

As you can see, there are many options that you can select in this section.

By default, all the options are pre-selected, this allowing user to not need to refine the system for usage. However, we highly recommend that you take a little time and define all the different options that will meet the needs of your company.

In addition, all the invoice types that will be left as selected will be the ones that will be visible afterward in the system.

If you would like to save the preferences that you have chosen, click on the submit button at the bottom of the page, and all of your preferences will be saved in the system.

Displayed Payment methods

For this second menu, you will find a similar user interaction with the first menu but instead of defining all invoice types, you will define all of the payment methods that fit your company needs.

For this menu, you shall select all of your preferences and preferably save them as explained in the previous section.

Measuring units

In this third menu, you will find a different menu compared to the previous ones. In this menu, you will define all the different units that shall be identified in your system documents.

Since Peppol has a large library of all the different measuring units possible, we have changed the navigation method to the one that you will find below.

PEPPOL					
Displayed Invoice Types					
Displayed payment methods					
Measuring Units					
Show 10 entries				Search: pie	
Unit Name	UBL Code	Unit Alias			
dozen piece	DPC	DPC	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
piece	H87	H87	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Piece Day	HAD	HAD	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Piece Month	HMO	HMO	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Piece Week	HWE	HWE	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
thousand piece	T3	T3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Piece	XPP	XPP	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Showing 1 to 7 of 7 entries (filtered from 2,162 total entries)					
First Previous 1 Next Last					
Peppol Invoice Recipients					

There are two main things that you are able to each measuring unit.

The first thing you shall be able to do in this menu is to define if you would like to have that Unit available for extraction in your system or not. To do so, you will only need to (un)select the select-box of the measuring unit that is in question.

The second thing that can do is to add or remove Unit alias to a specific one. Before we start explaining how to add or remove alias of one unit, we will start by explaining you what we mean by unit alias.

One **unit alias** to a measuring unit in our system means that, this alias shall be directly identified as the measuring unit. To help you visualizing all the what a unit alias means, let us take the example of the unit "Piece". Generally, in most of documents, you shall find "UA" to identify this measuring unit but you may also find "Piec." or "Stück". In order for the system to recognize all of these different nomenclatures to the measuring unit Piece, you will need to add them as alias to that specific measuring unit.

Now that you now know what these Alias are, in order to add or remove alias for each measuring unit, you shall click on the edit button of the corresponding unit that you would like to edit. You will then need to add all of the alias that you would like to add the the text box.

⚠ Important

Please separate each alias with a comma only.

Here is an example of what this edit page should look like with already some alias inserted into it.

Dashboard Templates Validations Tools Help

Edit measuring unit

Piece XPP

Unit Aliases (comma-separated list allowed)

XPP,UA

Submit **Cancel**

Once you have clicked inserted (removed) all the corresponding alias that you would like to have to your measuring unit, you will only need to click to the submit button on that specific page and all the aliases will be updated.

Peppol Invoice Recipients

In this part, you shall define all legal entities that shall be used for creating all of your Peppol XML invoices.



Editing your customers

You can always edit your current customers by clicking on the edit button and changing all the desired data.

:fontawesome-circle-plus: .lg .middle } Adding new customers

Add more customers by clicking on the plus icon and define the new one. Our system also offers a database full of customers that could potentially already have yours.

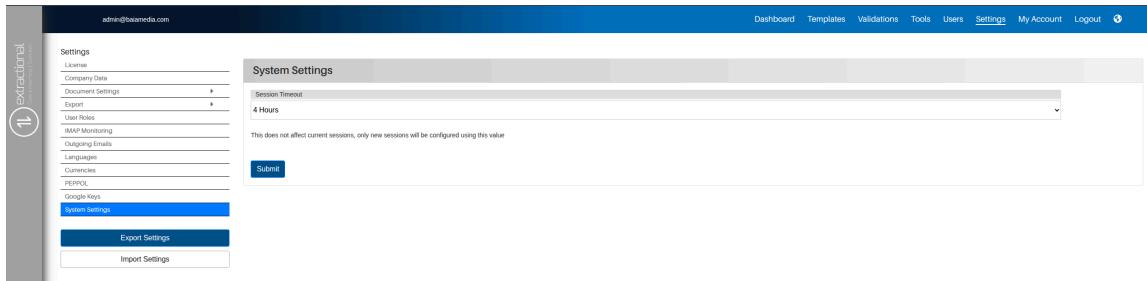
Google Keys

This feature is still under development

System Settings

In this page, you will be able to define all general settings of your system.

Overview



Defining a new time-out session

In this menu, you can define the duration for which a connected user shall be connected to the system without having to reconnect into the system.

To do so, you will need to click on the current timeout duration defined in the system and choose the new desired timeout duration.

After doing so, you will need to save your new preference by clicking on the `Submit` button that can be seen at the bottom of the page.

Note

Please pay attention that changing the timeout duration will not affect current sessions, only new sessions will be configured using the new timeout session duration.



Peppol

Français

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Peppol-Introduction

Français

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Version: v0.1

Introduction



Annonce importante

Cette page est encore en cours de traduction dans votre langue. Pour le moment, vous pouvez utiliser cette page en anglais.

This Chapter will consist on explaining all Peppol features that our system offers as well helping you setting all these features in your system. We will also help you guide on how to use these features afterwards.

What is Peppol about what would be the interest to integrate in your system

Maybe you were familiar with Peppol, Peppol is a standardized way to send invoices from one company to another. As most companies regularly use this system, our company thought about using these standards to add some helpful features to our system.

What is special about Peppol compliant documents is that all Peppol compliant invoices are forced to use a certain pattern and this pattern will allow us to extract even more information from your documents, thus automating some of the processes of your company.

One of the features that will be available to all Peppol compliant documents is that the system will not only look at a certain document and extract the general information about it (Name, Date, Sum(brut), etc.) but will also itemize all items that can be found in the document and save all the informations in each item specified in your document to use it for further features in the system.

Features enabled with Peppol compliant Documents

Having Peppol-compliant documents in the system allows for a handful number of features. These features will include:



Easy verification

Verification of all the calculated values in the document are correct. This includes VAT and temporary deduction if invoice is paid within a certain amount of days, for example.

Easy comparison of documents

Comparison of documents in the system. The system will enable comparative of to specific documents in the system, this can be helpful if you would like to quickly identify why the total price of a certain quote differs from the corresponding invoice.

SEPA transaction automation

Enabling SEPA transaction automation. The system will also allow you to automatically create SEPA XML files in your system for all the desired documents.

Generating Peppol compliant files

Extraction of all Peppol (or ZUGFeRD for Germany) invoices in their respective format.



Peppol-Prerequisites

Français

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Version: v0.1

Prerequisites



Annonce importante

Cette page est encore en cours de traduction dans votre langue. Pour le moment, vous pouvez utiliser cette page en anglais.

In this section of this chapter, you will find all the different tasks that need to be accomplished in order to set our system to be Peppol-compliant.

Defining all the different fields to be extracted in each item

One of the first tasks that shall be done is to define all the fields that you would like to extract within each item of your document.

To do so, you will need to go to the setting page followed by the **Analysis Field** page. Once you have found the correct page, you shall once find the correct table to define all the different fields. If you would like more precise information on this topic, you can go to the section about [setting up all fields](#) in the previous chapter.

Although our system allows you to personalize all the fields, we recommend that you always have some of the fields. The following fields that should always be used are:

- Position
- Article Number
- Quantity
- Measuring unit

These fields, while being common to be present in all documents, will also allow easy the usage in the following tools such as for the document comparison as well as for Peppol exporting documents.

Adding all of your bank details into your account

Since one of the main features of our system is about generating SEPA transaction XML files, one of the prerequisites that is needed to have the system working would be to add all of your account(s) that you would like to realize your payments in the system.

To do so, you shall need to add all of your accounts in the Settings page. For more specific information, please go to the [Company Data](#) section in the previous chapter of this manual, where you can find a detailed guide on how to add an account in your system.

Setting up all needed export formats

Since there are some specific export formats that are specific for Peppol-compliant documents, you will need to define them before you start exporting all the desired documents. Here is a list of all the export formats that you might need to define, as well as an explanation about the features that it will enable.

- XML format: This format must be pre-defined if you want to generate SEPA XML files. Please use the following link for a more detailed guide on how to define all XML export formats.
- Peppol format: This format will allow you to export all documents and transactions in a PEPPOL format. Please use the following link for a more detailed explanation on how to define all the PEPPOL export formats.
- ZUGFeRD format: This format will allow you to export all documents and transactions in a ZUGFeRD format (Germany-specific format). Please use the following link for a more detailed explanation on how to define all the PEPPOL export formats.

Customizing all PEPPOL specific parameters for your company

One of the main difficulties when working with Peppol-compliant data is generally to find the correct option within all of the options that the system provides. This is especially the case when we start talking about measuring units as well as payment methods.

So, to help our users have a more convenient experience in our system, we do allow hiding some of the options that Peppol has at your own disposal.

In addition, if you would like to have a more in-depth guide on how to define all the different options that you would like to have in your system, please follow following [link](#) that will take you a more precise guide on how to use the following page.



Peppol- Documentation_with_Peppol

Français

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Version: v0.1

Documentation with Peppol



Annonce importante

Cette page est encore en cours de traduction dans votre langue. Pour le moment, vous pouvez utiliser cette page en anglais.

In this section you will find a guide on how to have documentation being Peppol compliant and you will also find a guide on how all validation shall be visible once your documentation is Peppol compliant.

Creating Peppol-compliant Templates

Before you start having Peppol-compliant validations, you will need to create templates that are also Peppol-compliant. This will allow our system to automatically extract all the information from each element of each document.

You will start by creating a new template as usual; a more in-depth guide can be found on the [previous chapter](#) about creating a new template.

Once you have created this new template and added all the fields as usual, you shall trigger the system to be Peppol compliant. To do this, you shall click on the respective check-box that is situated at the bottom of the fields window, and all the Peppol-specific fields should also pop-up.

The screenshot shows the Extractional software interface. On the left, there's a sidebar with a logo and navigation links. The main area is divided into two sections: 'Invoice Template' on the left and 'Data Collection' on the right.

Invoice Template:

- Header:** SOYC-IETS, INVOICE, SOYC-IETS logo.
- Customer:** SOYC-IETS, New Brighton, USA.
- Address:** Major Office Building, New Brighton, 812 Industrial Way, Suite 10, Rockin Heights TX 70511.
- Table:** Shows three items with descriptions like 'Software development project', 'System maintenance', and 'Software architecture planning'. It includes columns for Item #, Art #, Description, Qty, Unit Price, and Amount.
- Subtotal:** 2,102.77
- Tax:** 11.00%
- Total:** 2,334.07€
- Contact Info:** Phone +1(872)555-1188, Fax +1(872)555-1186, Email: sales@soyc-iets.net.

Data Collection:

- Identifying Label:** Example Value: 60007
- Supplier City:** Strictness: Softness
- Supplier Country (2-Letter Code):** Strictness: Softness
- Feed Value:** US
- Zoning/Attribut:** Strictness: Softness
- Customer Company Name:** Example Value
- Customer Address:** Example Value
- Customer Postcode:** Example Value
- Customer City:** Example Value
- Customer Country:** Example Value
- Position:** Strictness: Softness
- Article Number:** Strictness: Softness
- Quantity:** Strictness: Softness
- Measuring Unit:** Strictness: Softness

Checklist: ✓ Also extract itemized product list (required for Peppol-compliant XML output)

Once you have triggered the system, you will now need to define all the Peppol specific fields. The mechanism to define each field will be the same as before, but in this part you will be defining all fields of each element for itemization. There are some important points that should be considered once linking all fields:

- All example values to which reference shall be referred shall refer to the first element of the document.
- For the description specifically, you only need to click on the first element of the description.

Once you have linked all the different fields, you shall only click on the `Submit` button located at the bottom of the page.

Now, all documents that use this template will automatically be Peppol compliant.

Peppol-compliant Validations

Once you start receive Peppol-compliant validations, you will start to see the main advantage of using Peppol compliant data in our system.

Itemization of elements within each validation

The first main difference that you will be able to see is the itemization that will be available to be seen as a table in each validation. This can be seen in the validation edit page, at the bottom of the data page.

							Search:
Position	Article Number	Description	Quantity	Price Unit	Total Amount		
1	665887	Ergonomic wireless, UA keyboard	10.0	59.99	665.89		
2	556994	Encrypted USB drives, UA (64GB)	10.0	22.56	250.42		
4	45	Web development, UA services (frontend, + bac)	1.0	899.00	997.89		
3	65	Data migration	1.0	2,999.00	3328.89		

4 items found Total amount: 5243.09

Prepayments/Payments done table

The second additional element that is available when using Peppol enabled validations is allowing to store all (pre)payments made for a specific validation.

Prepayments/Payments Made		
Note, amounts that should be deducted must be negative numbers, unpaid amounts that should be added shall be positive numbers		
Search:		
Description	Amount	Add to
		Net Amount

Add...

In order to add a new payment, it is as simple to add a new line into the table and save the values at the bottom of the validation's page.

Important

Please be aware that all the different payment values need to be inserted in relation to the document, which means that if a document has already been partially paid, the number inserted will be **negative**.

Payment Terms indication table

The third additional element is the `Payment terms` field. In this table you shall enter any specific payment terms that the respective customer has requested.



2025-08-25 Received Andre (andremartins.el003@gmail.com)
2025-08-25 Verified Andre (andremartins.el003@gmail.com)

Exportation of all items

In addition, you can also export all the different items into a file. You will have the ability to choose the export format as well as the template.

Info

Please, make sure that you have a template that satisfies your satisfaction before exporting a validation.

To realise this operation, you will need to go to the edit page of the validation that you would like to export and navigate to the end of the data page.

Once there, you will be able to see all the selective fields where you can select the format of export as well as the template that you would like to use. Once you have selected your preference, you will only need to click on the `Export` button at the bottom of the page, and the file will automatically download to your system.

Output Format	Output Type
CSV	As File
First template	
Submit	



Peppol-Tools_with_Peppol

Français

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Version: v0.1

Additional tools and features



Annonce importante

Cette page est encore en cours de traduction dans votre langue. Pour le moment, vous pouvez utiliser cette page en anglais.

When using Peppol-compliant transactions, you will be able to use some additional tools that are available in the tools page. These tools will again help you improve your workflow during the day.

The additional tools that are available once you have introduced Peppol-compliant documents to your system are:

- Document comparison
- SEPA XML file creation

Document comparison

This tool will allow you to compare two documents, item-by-item, and will visualize the differences between both items.

For more information, please go to the following [section](#) where you can find a more in-depth guide on how to use this tool.

File exportation

Once you have various validations released in your system that are Peppol-compliant, you will be able to generate various exportations related to these validations.

For more information on how to export documents, please see the following [section](#).



Multi Tenant System

Français

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Multi tenant system

Français

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Version: v1.0

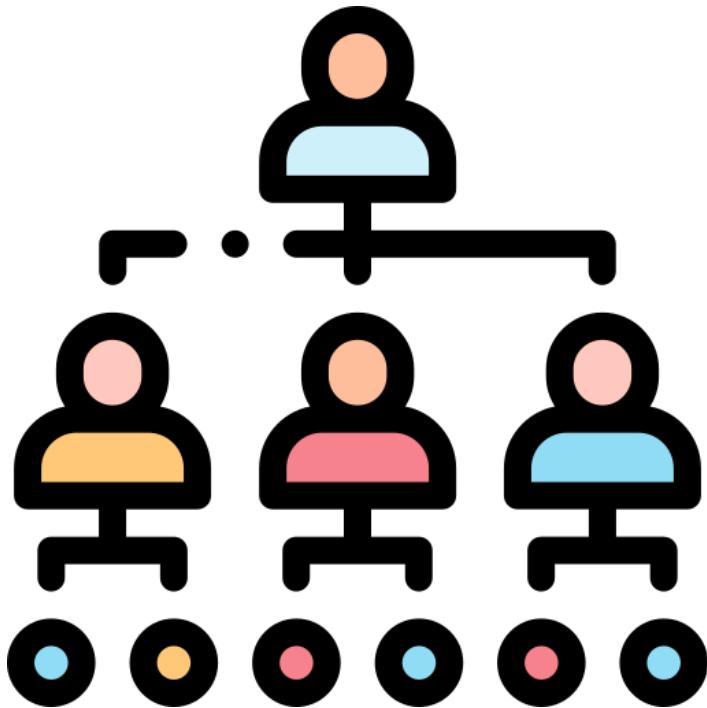
Configuration du système pour le support multi-organisation

Dans cette partie du manuel, nous allons expliquer comment configurer votre système pour inclure plusieurs sous-organisations au sein du même système.

Cette fonctionnalité permettra à votre système d'avoir des sous-organisations travaillant sur le même système/serveur. Cela permettra à votre entreprise multi-organisationnelle de travailler avec la même licence et le même serveur, ce qui améliorera à la fois les coûts et l'efficacité énergétique de notre système.

⚠️ Important

Il est important de comprendre que toutes les sous-organisations fonctionnent indépendamment les unes des autres et qu'aucune information ni aucun utilisateur n'est partagé entre les plateformes.





Multi tenant system-Setting up the system

Français

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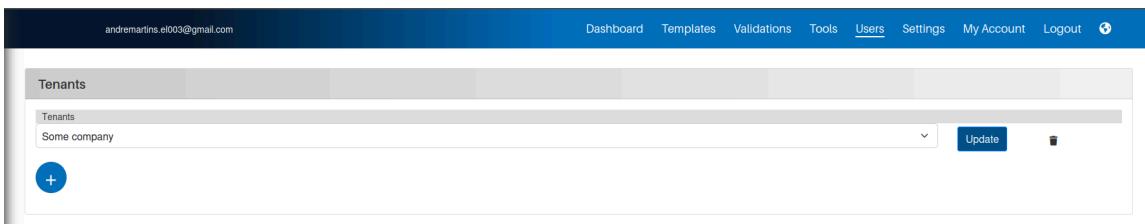
Version : v1.0

Configuration du système

Dans cette partie, vous apprendrez à configurer le système ainsi qu'à définir chaque utilisateur pour chacun des tenants, comme nous les appelons.

Ajouter toutes les sous-organisations dans le système

La première étape de ce processus consiste à ajouter toutes vos sous-organisations dans le système. Pour ce faire, vous devrez vous rendre sur la page principale `Utilisateurs` et naviguer jusqu'à la tuile `Tenants`.



Une fois au bon endroit, vous devrez ajouter tous vos Tenants. Pour ce faire, vous devrez déclencher le système en cliquant sur l'icône `plus` en bas de la fenêtre des tenants.

Vous devrez ensuite ajouter toutes les coordonnées respectives des sous-organisations et les enregistrer en cliquant sur le bouton `Soumettre`.

Modifier un Tenant existant

Vous avez toujours la possibilité de modifier l'un des Tenants de votre système en cliquant sur le bouton `Mettre à jour` situé à côté du Tenant actuellement sélectionné.

Ajouter tous les utilisateurs pour chaque organisation

Une fois que tous les tenants ont été définis, vous pourrez maintenant définir tous les utilisateurs pour chacune des organisations.



Quelques précautions avant de commencer à ajouter des utilisateurs

- Chaque utilisateur doit avoir une adresse e-mail unique pour tous les tenants.

Définir toutes les permissions pour tous les utilisateurs ainsi que d'autres préférences

Cette partie est encore en cours de développement



Other useful pages

Français

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FAQ

Français

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Version: v1.0

FAQ

Problèmes avec le système ?

?

Impossible d'exporter un modèle



?

Validation impossible à visualiser



?

Avoir constamment des messages d'erreur dans votre navigateur



?

Impossible de voir tous les éléments d'un tableau



