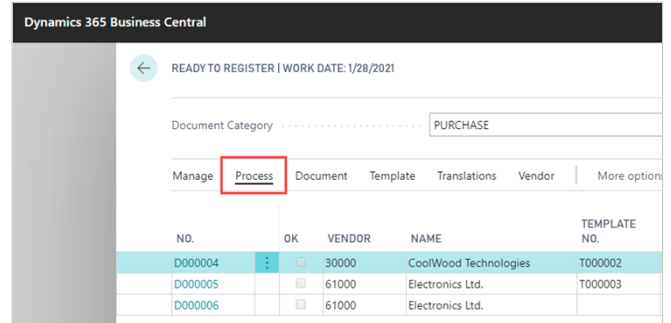You can match incoming purchase documents against purchase orders and purchase return orders. This guide describes the basics of how to conduct a match of a purchase invoice against a purchase order. Select the action "**Process**" in the ribbon.

Select "**Match Lines**".
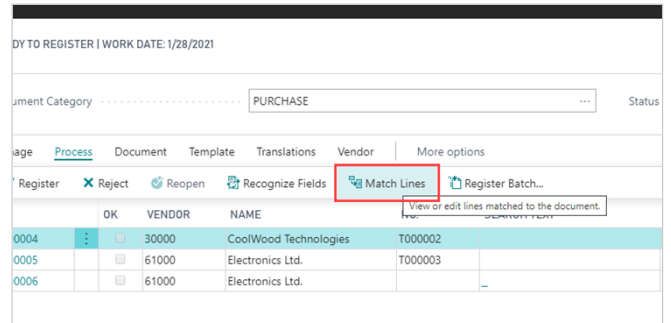

The matching page contains several sections. Let's spent a few seconds going through the individual page parts.
At the top of the page, we have the "**Match Overview**".
This section contains infomation about what order numbers to match againt and the amounts in play.
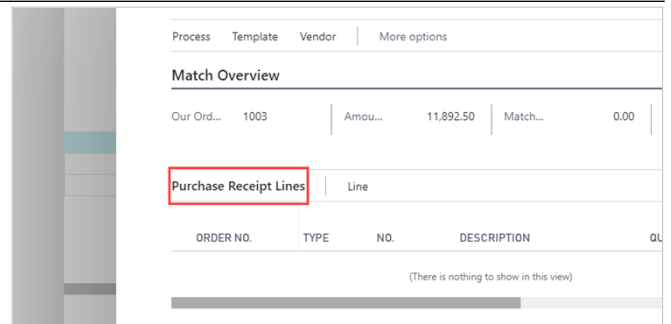
The next section, "**Purchase Receipt Lines**", is where the posted "**Purchase Receipt Lines**" is shown.
In this session no receipts were posted for this vendor.
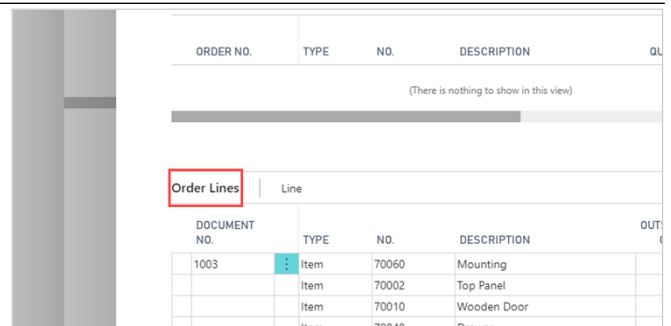
At the bottom of the page, we have the "**Order Lines**" section. As you can see, we have a bunch of Order Lines available.
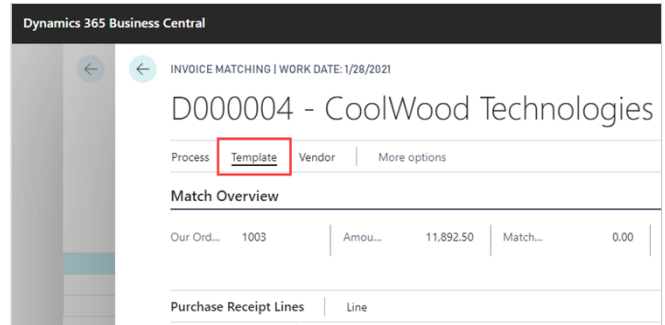
Before showing the function you should activate - the order matching function - let's have a quick tour around some of the template settings related to the order matching process.
To open the template, select the action "**Template**" in the ribbon.

Select "**Template Card**".

To ensure that the matching process is activated every time a document from the current vendor is received, please choose an appropriate value in the field "**Invoice Reg. Step 1**".
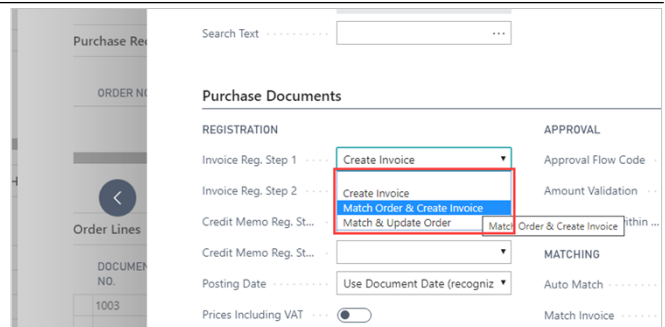
Leaving the field blank, Document Capture does nothing when registering the document. "Create Invoice" is the default value in this template. When registering the document, Document Capture creates an invoice, without demanding any purchase order matching. "Match Order & Create Invoice" is the most used option. Document Capture checks if the document was matched before, by creating a purchase invoice. If no match was conducted, Document Capture will ask if you want to create the invoice or return to the document to complete the matching process. With "Match & Update Order", Document Capture checks if the document was matched before, by updating the purchase order lines. If no match was conducted, Document Capture will ask if you want to update the order or return to the document to complete the matching process.
Today we should choose the "**Match Order & Create Invoice**" option.
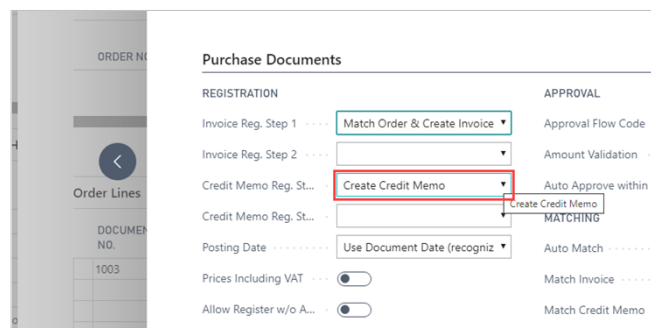
To ensure that the matching process is activated every time a document from the current vendor is received, please choose an appropriate value in the field "**Credit Memo Reg. Step 1**".
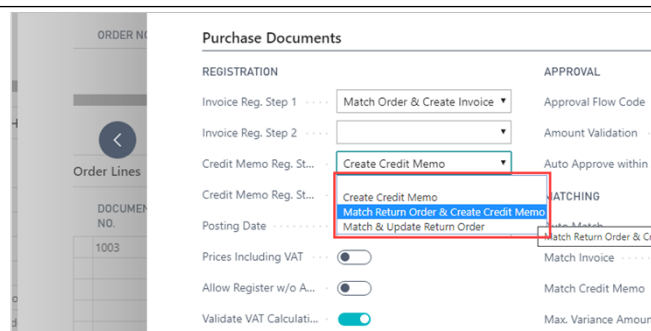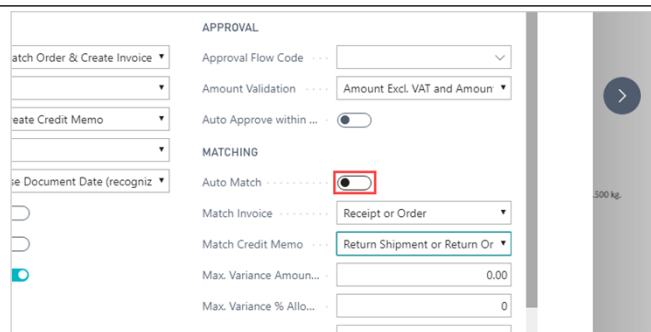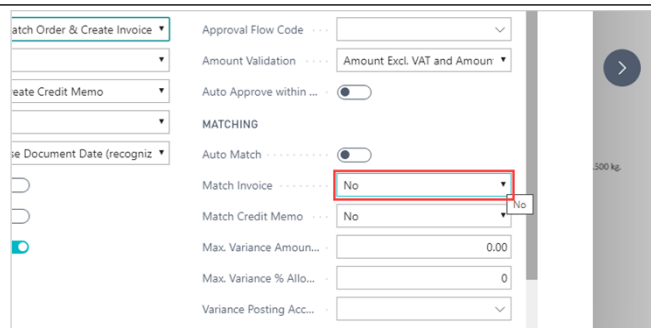

Leaving the field blank, Document Capture does nothing when registering the document. "Create Credit Memo" is the default value in this template. When registering the document, Document Capture creates a credit memo, without demanding any purchase return order matching. "Match Return Order & Create Credit Memo" is the most used option. Document Capture checks if the document was matched before creating a purchase credit memo. If no match was conducted, Document Capture will ask if you want to create the credit memo or return to the document to complete the matching process. With "Match & Update Return Order" Document Capture checks if the document was matched before updating the purchase return order lines. If no match was conducted, Document Capture will ask if you want to update the return order or return to the document to complete the matching process.
We will choose the "**Match Return Order & Create Credit Memo**" option.
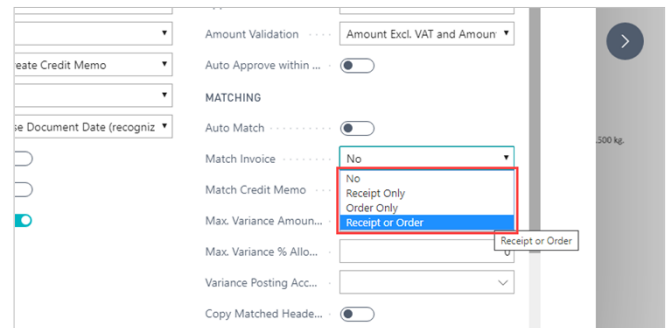

If you want the order matching process to run fully automated, you can activate this by enabling the switch "**Auto Match**". In this session, we will keep it disabled.
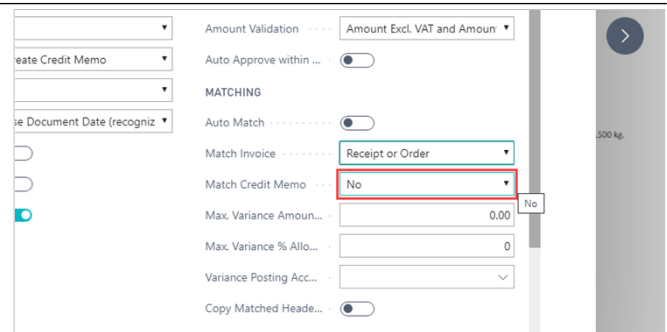

In the field "**Match Invoice**" you choose which document types you want to match when receiving an invoice.
When the option is set to "**No**" all automated matching is disabled.
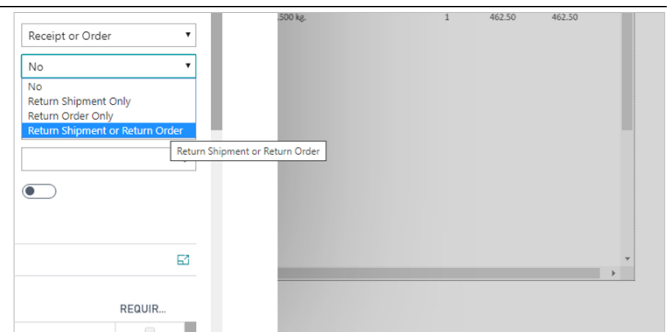You can still perform a manual match.

In this scenario, the preferred setting is "**Receipt or Order**". This will allow a semi-automated matching of both Receipt and Order lines.
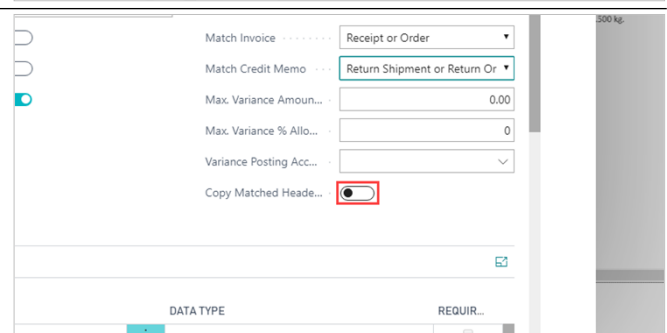
In the field "**Match Credit Memo**" you choose which document types you want to match when receiving a credit memo. With the option set to "No" all automated matching is disabled. You can still perform manual match.
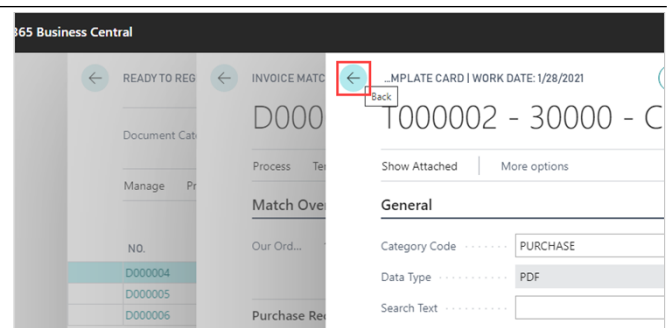
In this scenario, the preferred setting is "**Match Credit Memo**". This will allow a semi-automated matching of both Shipments and Return Order lines.
Enabling the "Auto Match" switch will have Document Capture, when completing the recognition of fields, automatically match the above-chosen document types.
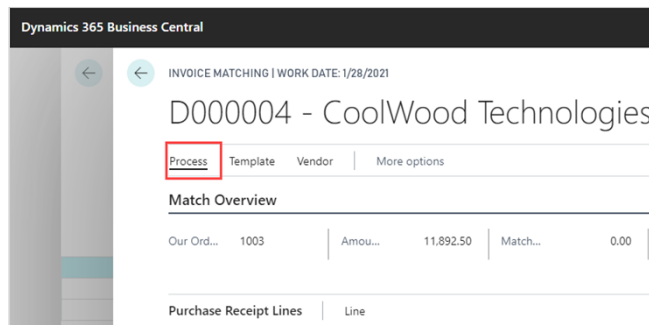
Enabling the switch "**Copy Matched Header Dimensions**" will copy the header dimensions of the first matched order or receipt to the new document created when registering an invoice or credit memo.

Select "**Back**" to return to the Invoice Matching page.

Now it is time to activate the matching function. Select "**Process**" in the ribbon.
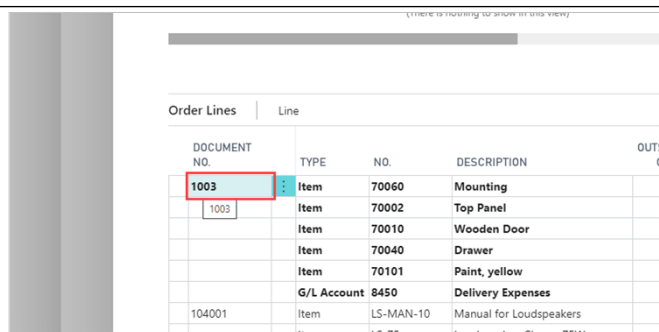
Select "**Perform Match**".

After activating the matching function, all the lines for order "**1003**" are now highlighted, confirming that the total amount match is completed.
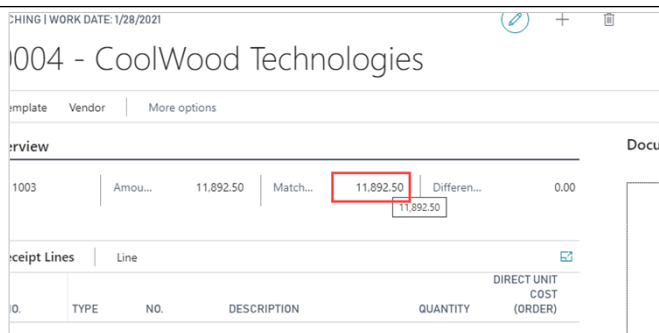
Looking at the Match Overview at the top of the page, further information confirms that the order match is just perfect.
 The value in the field "**Matched Amount**" is the same as...

...the value "**Amount to Match**", that was found during the recognition of the total amount header field.
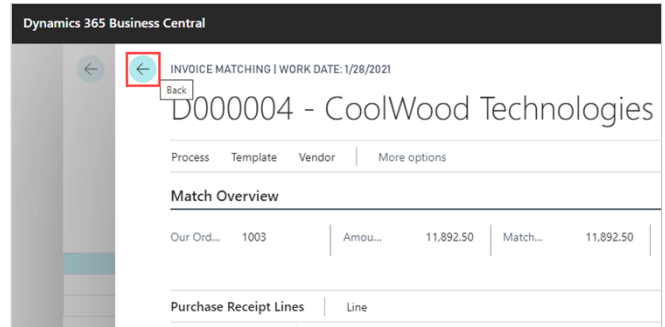
When satisfied with the matching result, you can register the document from the Invoice Matching page or select "**Back**" to return to the Document Journal.