Connect your AP inbox to the Invoice Inbox

Deep Space web app · Commercial · About 10 minutes · For accounts and finance teams

What this does

Connecting a mailbox as your workspace's **Shared Email** lets the Deep Space web app read the invoices that arrive in it. Each email with an invoice attached appears in **Commercial > Invoice Inbox**, where KAI reads the document and extracts the supplier, invoice number, amounts and GST. Your team then routes each one to the Invoice Register and on to approval.

The connection is read-only. Deep Space never sends from, moves or deletes anything in the mailbox.

Screenshots are from our demo workspace. Yours has the same menus and buttons.

Before you start

Use a dedicated mailbox

Deep Space syncs **every email in the Inbox folder** of the connected mailbox, and everyone in your workspace with Invoice Inbox access can see them. So:

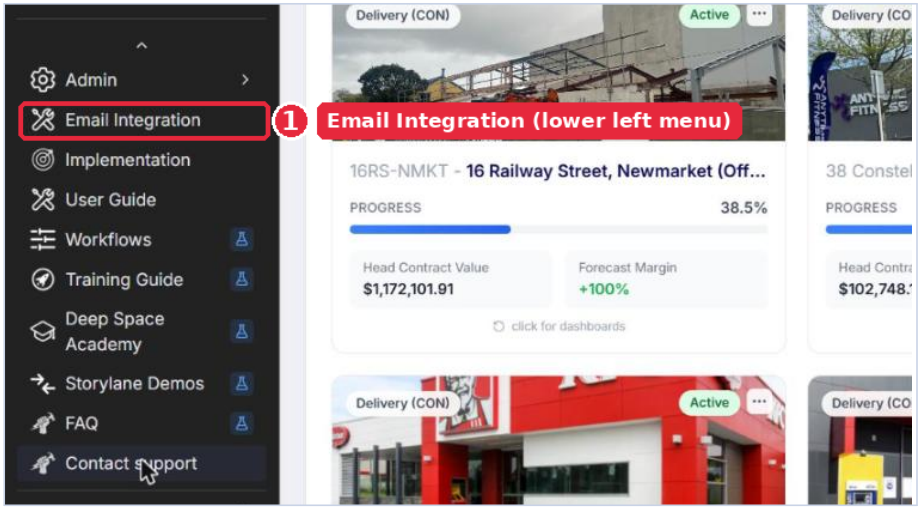
- **Never connect a personal mailbox.** Its emails become visible to the whole accounts team.
- **Avoid connecting a company-wide AP inbox** if it also receives invoices for projects or entities that are not in Deep Space. They will all land in the Invoice Inbox.
- **Set up a dedicated mailbox** just for Deep Space, for example *deepspace-invoices@yourcompany.com*. It starts clean and only holds invoices for projects that are live in Deep Space.

- **The mailbox needs its own sign-in.** You will sign in to Microsoft as the mailbox itself, so it needs its own password (a licensed user mailbox). A Microsoft 365 shared mailbox with sign-in disabled cannot complete the connection. Ask IT to enable sign-in or assign a licence first.
- **Microsoft may ask for admin approval.** Some Microsoft 365 tenants need an IT admin to approve new app permissions. If you see "Need admin approval", send that screen to your IT admin.
- **Use a private browser window.** Open Deep Space in an InPrivate or Incognito window so Microsoft asks which account to use, rather than signing in as you.
- **Do it yourselves.** It is quicker and more secure for your team to connect the mailbox directly than to share its login with anyone, including us.

STEP 1 Open Email Integration, then Shared Email

1. Log in to the Deep Space web app and open your workspace.
2. In the lower left menu, click **Email Integration**.
3. In the Configuration list, click **Shared Email**.

Account Connections is a different setting, used for sending emails. Leave it as is.

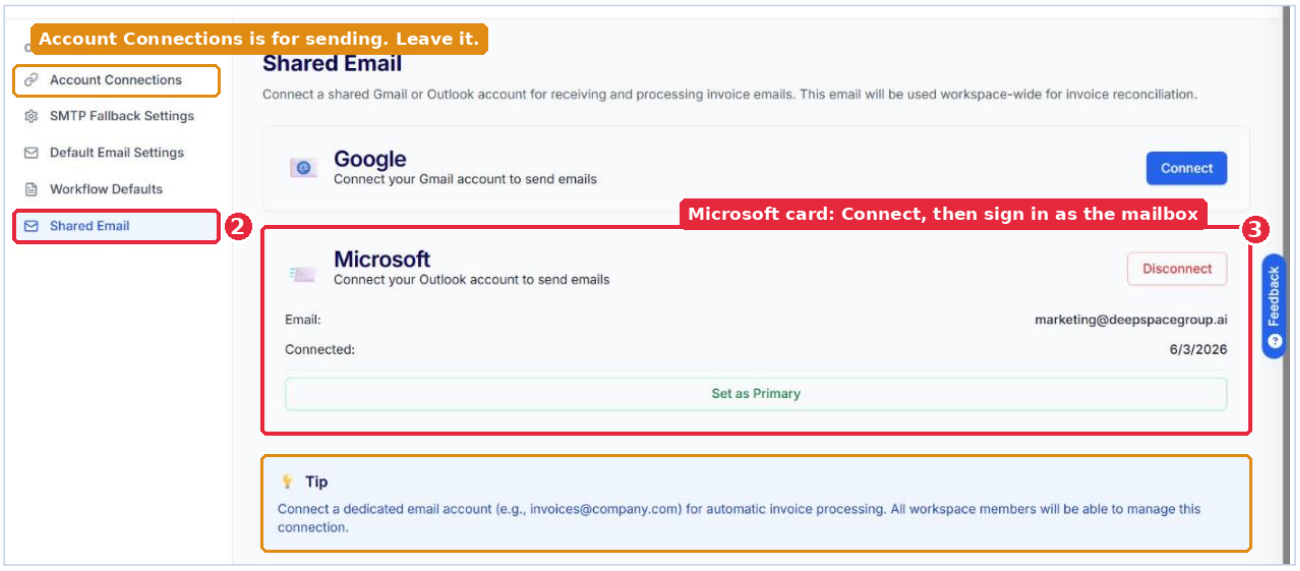


Email Integration sits in the lower section of the left menu.

STEP 2 Connect the Microsoft account

1. On the Shared Email page, find the **Microsoft** card and click **Connect**.
2. Microsoft's sign-in page opens. Choose **Use another account** and sign in as your dedicated invoice mailbox with that mailbox's password.
3. Microsoft shows the permissions Deep Space is requesting (reading mail). Click **Accept**.
4. You are returned to Deep Space. The Microsoft card now shows the mailbox address and today's date under **Connected**.

> Using Google Workspace? Use the Google card instead, the steps are the same.

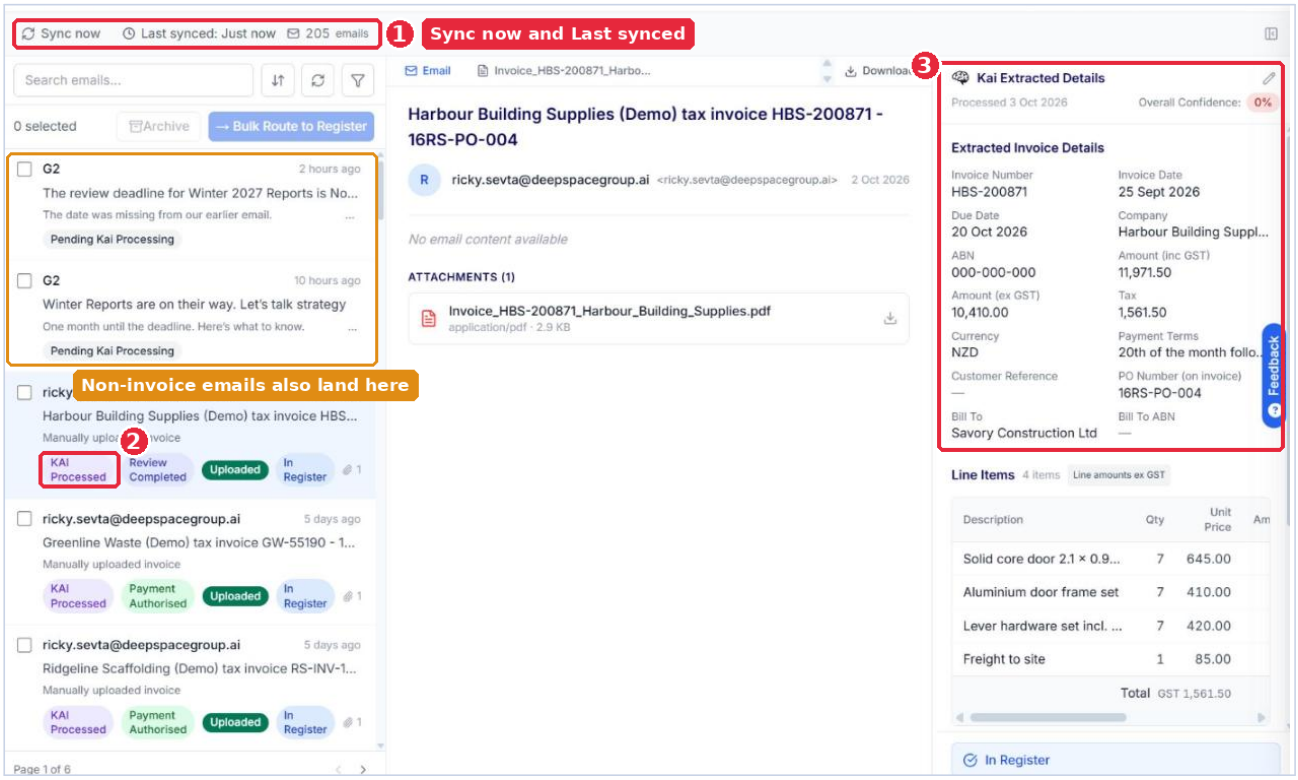


Shared Email page in our demo workspace. The Microsoft card there is already connected, so it shows Disconnect. In yours it shows Connect until you finish this step. Note the Tip: connect a dedicated mailbox.

STEP 3 Send a test invoice

1. From any other email address, send one sample invoice PDF as an attachment to the dedicated mailbox.
2. In the left menu, open **Commercial > Invoice Inbox**.
3. Click **Sync now** at the top. **Last synced** confirms the connection is working.
4. Your test email appears at the top of the list. Once the **KAI Processed** tag shows, click the email to check what KAI extracted.

Without Sync now, new emails are picked up automatically, usually within 15 minutes.



Invoice Inbox in our demo workspace: (1) Sync now and Last synced, (2) the KAI Processed tag, (3) what KAI extracted. The amber box shows why a dedicated mailbox matters: every email in the connected mailbox appears here, not just invoices.

STEP 4 Get invoices into the mailbox

1. **While projects are split between systems:** your team picks the invoices for Deep Space projects out of your main AP inbox and redirects (or forwards) them to the dedicated mailbox.
2. **Once most projects are in Deep Space:** add an Outlook rule. Go to **Settings > Mail > Rules > Add new rule**, give it a name, and add a condition that matches Deep Space invoices (for example by subcontractor, or project number in the subject).
3. Add an action: under **Route**, choose **Redirect to** and enter the dedicated mailbox. Click **Save**.

Redirect, not Forward. Redirect keeps the supplier as the sender. Forward makes every email look like it came from your own address, so KAI cannot match the invoice to the right supplier and you may need to select the supplier or subcontract by hand. KAI still reads the invoice PDF itself either way.

Tips

- Only send invoices for projects that are live in Deep Space. Anything else adds noise to the Invoice Inbox.
- Don't send your whole invoice history. To bring across open invoices, redirect only the unprocessed ones, once.
- Use **Bulk Route to Register** on the Invoice Inbox to send several checked invoices to the Invoice Register at once.
- Emails in the Invoice Inbox must be routed to the register before they appear in the Invoice Register. Invoices added with **Upload Invoice** in the register go straight in.

Troubleshooting

What you see	Likely cause	Fix
Microsoft won't let you sign in as the mailbox	It is a shared mailbox with sign-in disabled	Ask IT to enable sign-in or assign a licence, then repeat Step 2
"Need admin approval"	Your tenant blocks users approving new apps	Your IT admin approves the Deep Space request once
It connected your own email instead	Microsoft reused your signed-in session	Click Disconnect, then redo Step 2 in a private window
Test email is not in the Invoice Inbox	Not synced yet, or no attachment	Click Sync now, and check the invoice is attached as a PDF
Supplier shows as your own company address	The email was forwarded, not redirected	Change the rule action to Redirect to, or select the supplier by hand
Unrelated emails in the Invoice Inbox	The connected mailbox receives more than Deep Space invoices	Switch to a dedicated mailbox and contact us to clean up

Need a hand?

Email **help@deepspacegroup.ai** and we'll jump on a quick call. For the full Invoice Inbox to Xero walkthrough, see *Commercial to Xero: End-to-End Integration Guide*, pages 11 to 12.