Invoice Inbox and Invoice Register

Receiving, matching, checking and approving supplier invoices and subcontractor claims, with KAI

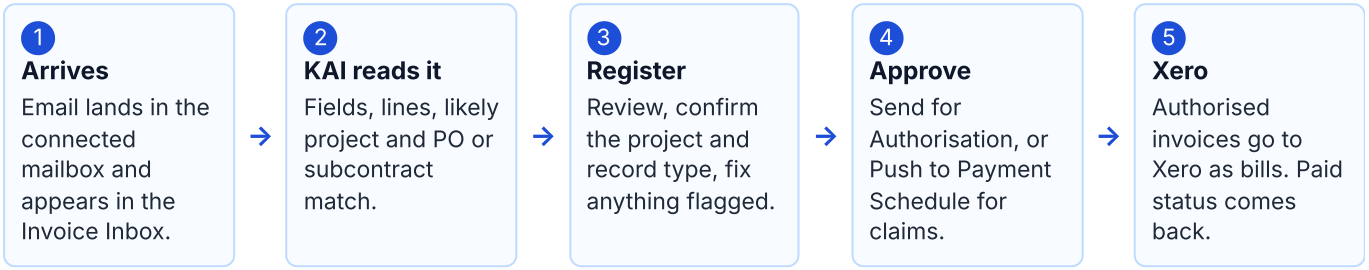
Deep Space web app · Commercial · October 2026 · For accounts teams and contract administrators

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1. What this feature does

Every supplier invoice and subcontractor claim that lands in your accounts mailbox shows up in the **Invoice Inbox**. KAI reads each document, pulls out the supplier, invoice number, dates, amounts, GST and line items, works out which project it belongs to and looks for the purchase order or subcontract it should be matched to.

From there each invoice moves to the **Invoice Register**, where your team checks it, confirms the record type and sends it through approval. Supplier invoices are authorised and pushed to Xero. Subcontractor claims are pushed to a payment schedule. Along the way Deep Space checks for duplicates, unapproved purchase orders, the wrong supplier's PO and changed bank details, so a bad invoice is stopped before it is paid.



2. When to use it

- Your accounts team is processing the week's supplier invoices and subcontractor claims.
- A contract administrator wants to see only the invoices for their own project.
- You need to check why an invoice cannot be sent for authorisation yet.
- Finance wants an export of what is waiting, approved or paid.

3. Before you start

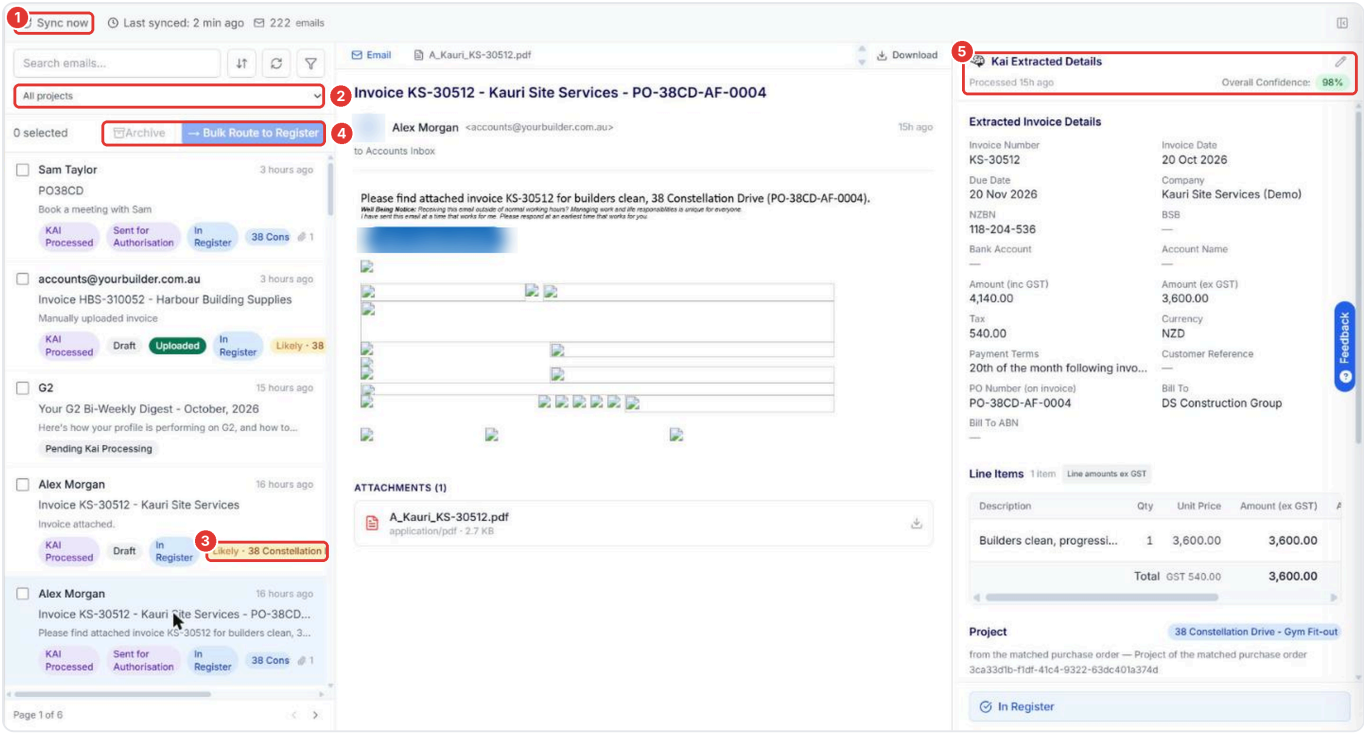
- **A mailbox is connected.** Your workspace's invoice mailbox must be connected under **Email Integration › Shared Email**. See the *Connect AP Inbox to Deep Space* guide.
- **Purchase orders and subcontracts exist and are approved.** KAI only auto-matches to approved purchase orders, and an invoice cannot be sent for authorisation against an unapproved one.
- **Suppliers are in the Company Directory** with their ABN or NZBN and bank details, so the supplier identity check has something to compare against.
- **Xero is connected** if you want authorised invoices to flow to Xero automatically.
- **Project access.** The Inbox and Register open on the projects you have access to. Invoices that are not yet matched to a project stay visible to the whole team as a shared triage queue.

4. Step-by-step guide

STEP 1

Open the Invoice Inbox and filter to your project

1. In the left menu, open **Commercial › Invoice Inbox**.
2. Click **Sync now** if you are expecting a new email. **Last synced** shows when the mailbox was last read.
3. Use the project dropdown to show **All projects**, a single project, or **Could not match to project** for invoices KAI could not place.
4. Click an email. The email and its attachment open in the middle, and **Kai Extracted Details** open on the right with KAI's overall confidence.

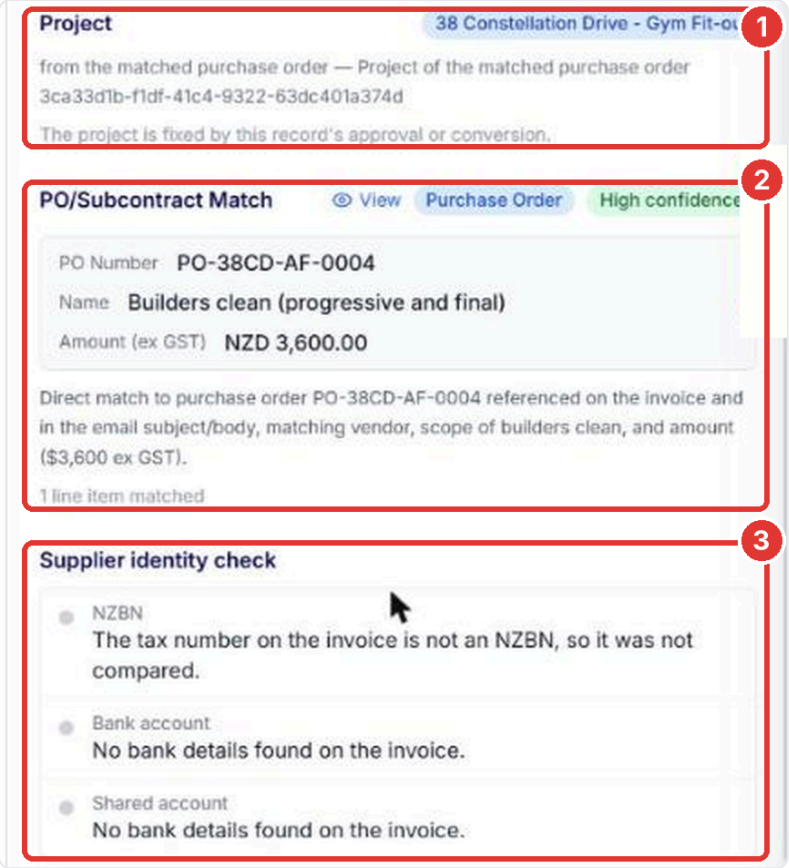


1. **Sync now** reads the mailbox straight away.
2. Project filter, including **Could not match to project**.
3. A **Likely** tag is KAI's suggested project. It is not confirmed until someone confirms it.
4. **Archive** and **Bulk Route to Register** act on the ticked emails.
5. **Kai Extracted Details** with the overall confidence score.

STEP 2

Check what KAI found

Scroll the right-hand panel. KAI shows the project it used and why, the purchase order or subcontract it matched (with a confidence label), how many lines it matched, and the **Supplier identity check** result.



1. **Project**, and where it came from (here, from the matched purchase order).
2. **PO/Subcontract Match**, with the reason for the match and the number of lines matched. **View** opens the PO.
3. **Supplier identity check**: the ABN or NZBN and bank account on the invoice compared with the Company Directory.

Only clear matches are linked automatically. KAI links an invoice by itself only when its confidence is at or above your workspace's threshold and, by default, every invoice line maps to a PO or subcontract line. A match on supplier alone is never auto-linked. Anything else is shown as a KAI suggestion with the reason, for someone to accept or change. See section 6.

STEP 3

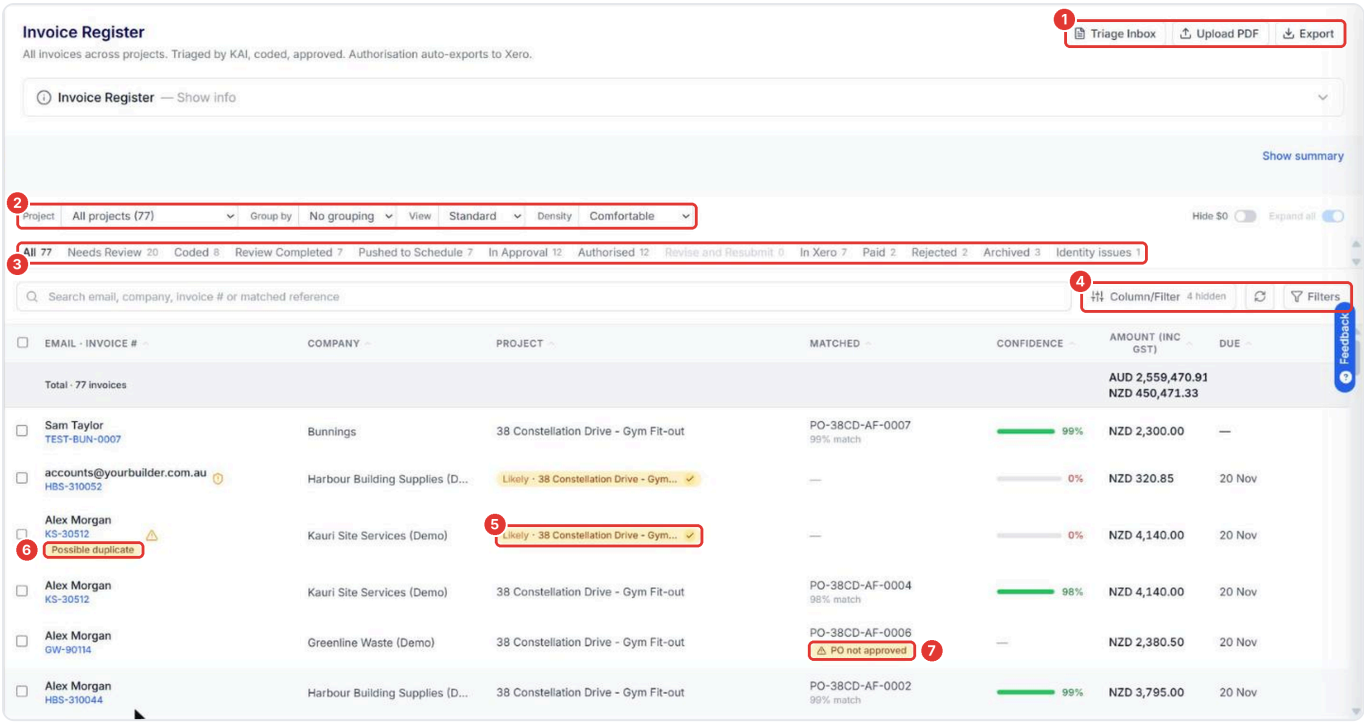
Send it to the Invoice Register

Once an invoice is in the Register, its Inbox row shows an **In Register** tag. To move several at once, tick them and click **Bulk Route to Register**. Use **Archive** for emails that are not invoices, such as newsletters or statements.

STEP 4

Work the Invoice Register

Open **Commercial › Invoice Register**. Every invoice across your projects is listed here, with its company, project, matched record, KAI confidence, amount and due date.

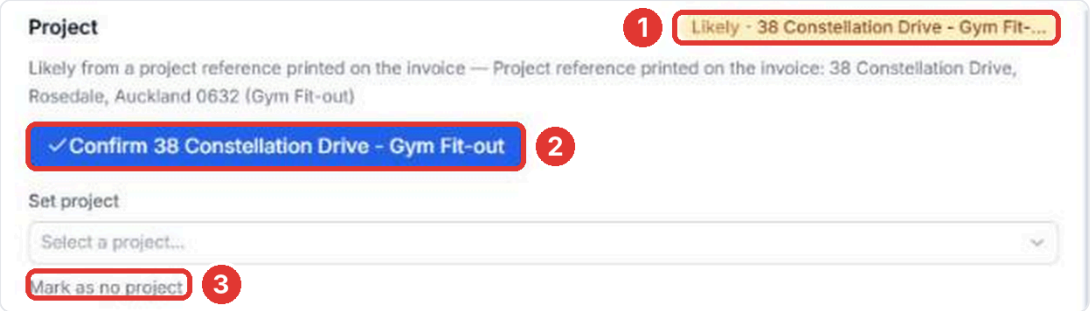


1. **Triage Inbox** goes back to the Inbox. **Upload PDF** adds an invoice that did not come by email. **Export** downloads a CSV of what is on screen (current tab, filters and visible columns).
2. **Project**, **Group by**, **View** and **Density** change how the list is laid out.
3. Status tabs, from **Needs Review** through to **Paid**, plus **Archived** and **Identity issues**.
4. **Column/Filter** shows or hides columns. **Filters** narrows by status, dates, project, type, confidence, amount and more. Applied filters show as chips you can clear.
5. A **Likely** project that still needs confirming.
6. **Possible duplicate** badge (see section 5).
7. **PO not approved** badge (see section 5).

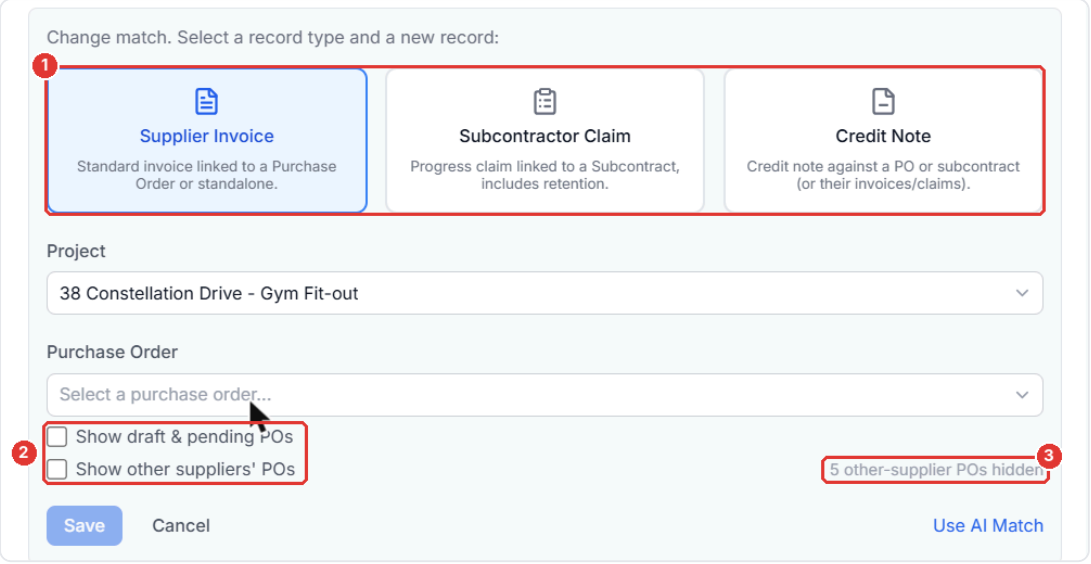
STEP 5

Confirm the project and record type

1. Click an invoice number to open it. The PDF or email sits on the left and the extracted details on the right.
2. If the project shows as **Likely**, click **Confirm** to accept it, pick another under **Set project**, or use **Mark as no project**.
3. Check the match. To change it, click **Change match**, choose the record type (**Supplier Invoice**, **Subcontractor Claim** or **Credit Note**), the project and the record, then **Save**. **Use AI Match** asks KAI to try again.
4. Click **Confirm Record Type** at the top right to move on.



1. The **Likely** project KAI suggested, and why.
2. One click confirms it.
3. **Mark as no project** for overhead or non-project invoices.

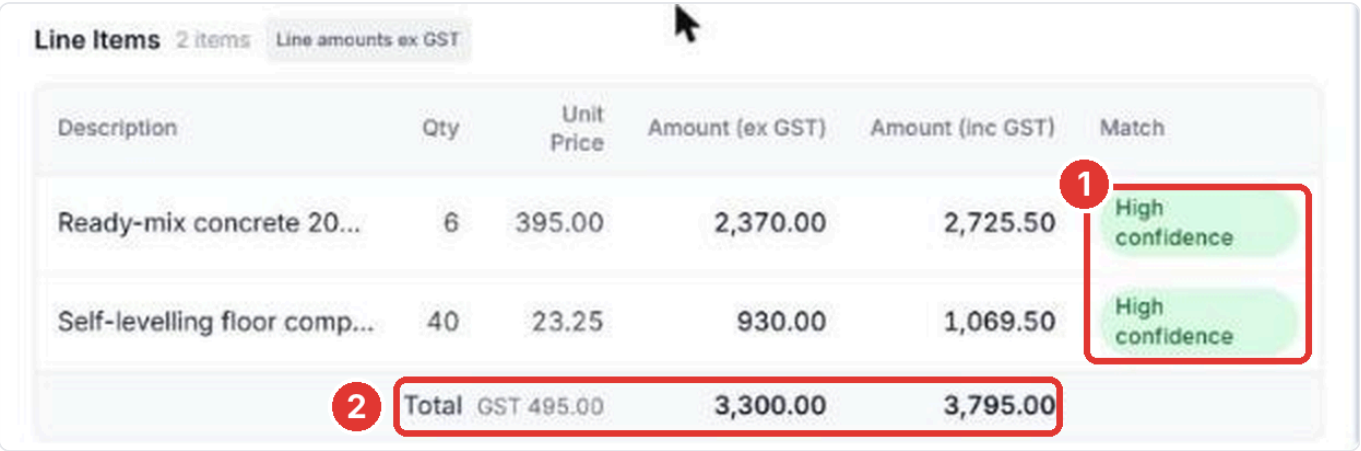


1. Record types: a **Credit Note** is its own type and reduces the commitment it is linked to.
2. The purchase order list shows approved POs for this supplier. **Show draft & pending POs** and **Show other suppliers' POs** widen it when you need to.
3. How many other suppliers' POs are hidden.

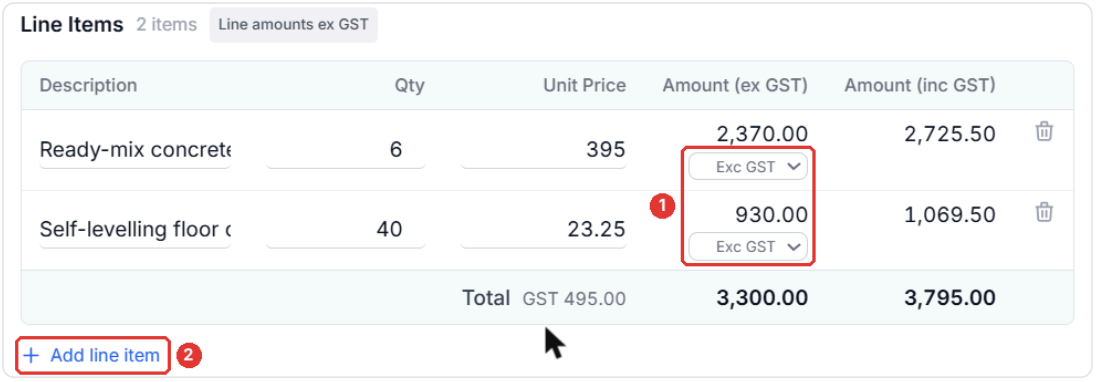
STEP 6

Check the lines and totals

Scroll to **Line Items**. Each line shows quantity, unit price, amounts ex and inc GST, and how confidently KAI matched it to a PO line. Check the totals agree with the invoice. Use **Edit** on **Extracted Invoice Details** to correct anything KAI misread, and set each line's GST basis to match how the supplier printed it.



1. Per-line match confidence against the purchase order.
2. GST and totals ex and inc GST. These must agree with the invoice before you approve.



1. In edit mode each line has a GST basis: **Exc GST**, **Inc GST** or **No GST** (for GST-free items on a supplier invoice, so mixed invoices total correctly). Click **Save** when you are done, or **Cancel**.
2. **Add line item** for anything KAI missed.

If a line takes the PO line over its remaining balance, you will see a warning such as "Exceeds order line remaining balance". It is advisory, so you can still proceed if the overrun is expected, or raise a PO variation first.

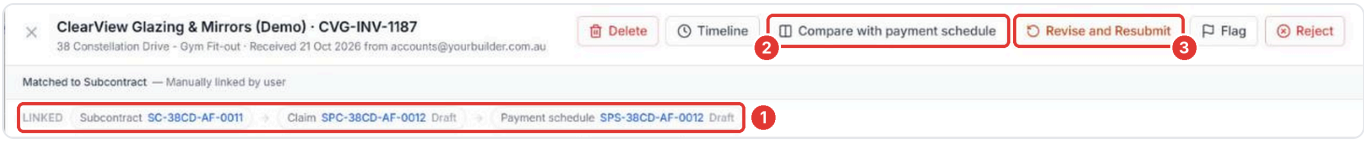
STEP 7

Approve and pay

Supplier invoices. Complete your review, then click **Send for Authorisation**. The invoice follows your Delegation of Authority route, which you can see on the record and in the Register's approvals view. When the final approval lands, an invoice matched to a purchase order is pushed to Xero automatically, with **Push to Xero** available as a manual fallback. The payment due date (from the invoice or the supplier's payment terms) goes to Xero as the bill due date.

Subcontractor claims. Click **Push to Payment Schedule**. Deep Space creates the subcontractor claim and a draft payment schedule with the attachments. The button stays disabled until the amount, invoice number, invoice date, record type and subcontract match are all in place, and its tooltip tells you what is missing.

Once a claim has been pushed, the **LINKED** strip at the top of the invoice takes you straight to the subcontract, the claim and the payment schedule. **Compare with payment schedule** shows the invoice and its schedule side by side.



1. **LINKED**: Subcontract › Claim › Payment schedule, each one click away.
2. **Compare with payment schedule** puts the two documents side by side.
3. **Revise and Resubmit** sends it back for correction.

5. The safety checks that protect payments

These checks run automatically. When one fires, the invoice is flagged in the Register and the actions that would pay it stay locked until someone resolves it.

Possible duplicate

Deep Space checks every upload for the same file (even renamed), and after KAI has read it, for the same supplier, invoice number and amount, or the same supplier and amount dated within a week. The copy, never the original, shows a **Possible duplicate** banner and badge.

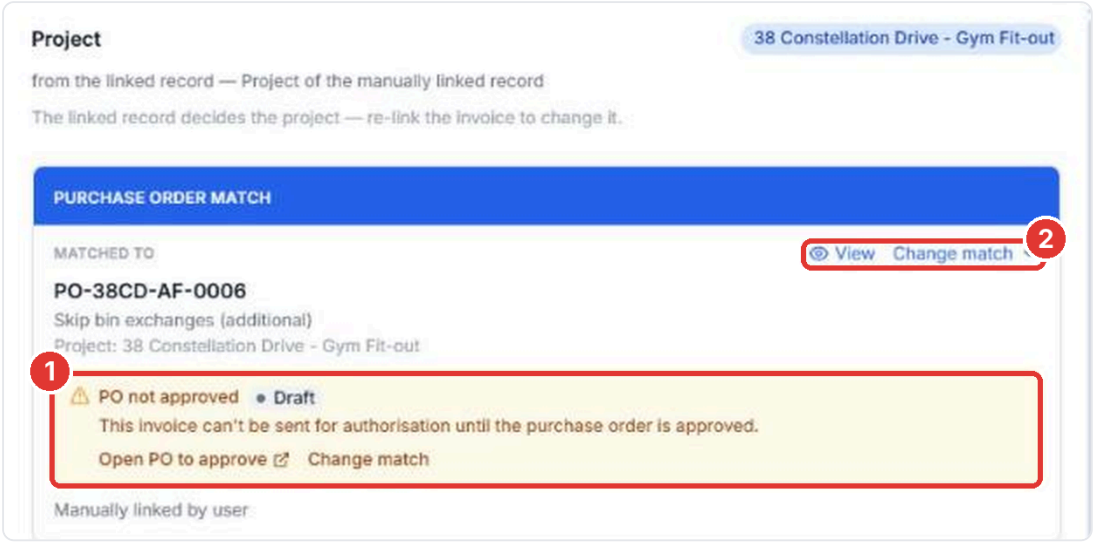


1. The banner names the existing invoice and why it matched. **Open existing** to compare, **Mark as duplicate** to archive the copy, or **Not a duplicate** with a reason, which is logged.
2. While it is unresolved, **Send for Authorisation**, **Push to Payment Schedule** and **Push to Xero** stay blocked.

If the supplier and number match but the amount is different, the banner asks whether it is a revised or resent invoice. There is also a **Possible duplicate** filter in the Register.

PO not approved

You can link an invoice to a draft or pending purchase order, but it cannot be sent for authorisation or pushed to Xero until that PO is approved. KAI never auto-matches to an unapproved PO.



1. The amber **PO not approved** panel shows the PO's status. **Open PO to approve** takes you to it, or **Change match** if it is the wrong PO.
2. **View** and **Change match** are always available on the match.

Another supplier's purchase order

The purchase order list only offers the invoice supplier's own POs. If someone links an invoice to a PO that belongs to a different supplier, it is flagged as a supplier mismatch and cannot be sent for authorisation, which stops one invoice being paid through two POs. Only an Admin can show other suppliers' POs and override, and the override reason is recorded on the invoice's **Timeline**.

Supplier identity check (ABN or NZBN and bank details)

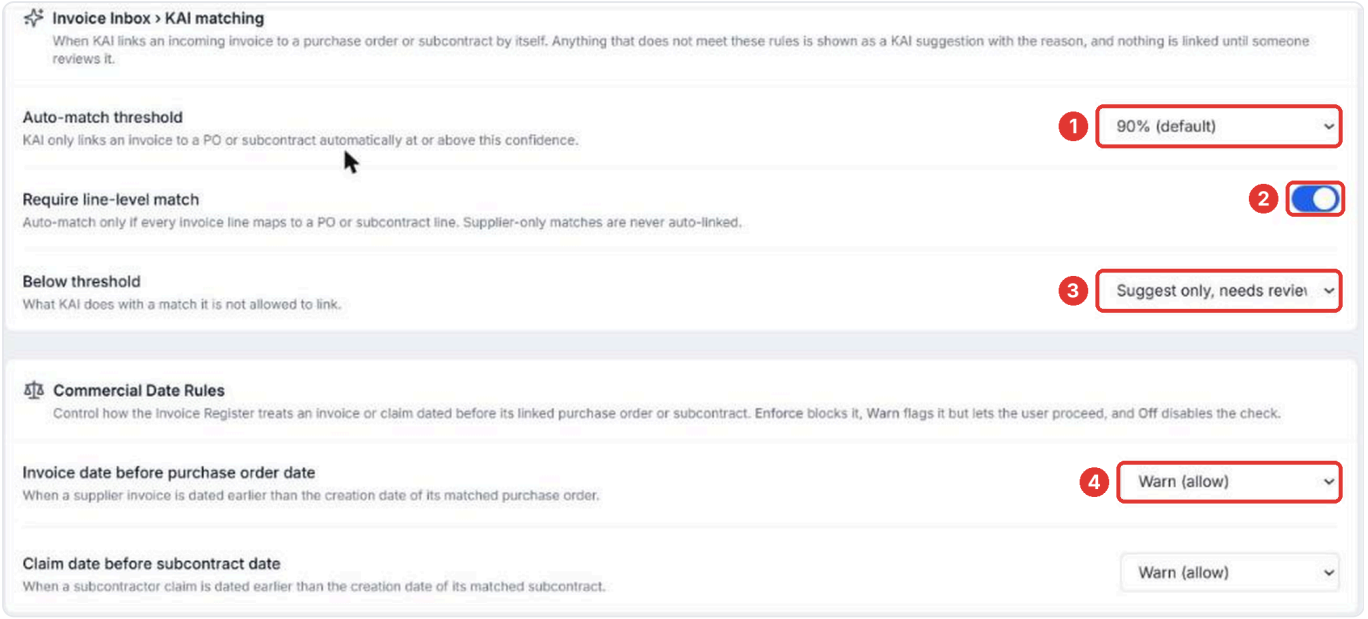
When the supplier identity check is turned on for your workspace, KAI compares the tax number and bank account printed on the invoice with what is held in the Company Directory. A red **Bank details changed** result blocks **Send for Authorisation**, and the Register lists these under the **Identity issues** tab. Updating a supplier's bank account from an invoice needs a second Admin to approve. The full workflow is in the *Supplier identity check: ABN and bank details* guide.

Invoice dated before its purchase order

Your workspace decides whether an invoice dated before its PO is blocked, flagged or allowed. See **Commercial Date Rules** in section 6.

6. KAI matching settings

Admins set how cautious KAI is in **Admin › Company Settings › Commercial**, under **Invoice Inbox › KAI matching**. Changes are recorded.



1. **Auto-match threshold**: KAI only links an invoice by itself at or above this confidence (90% by default).
2. **Require line-level match**: on by default. Auto-match only when every invoice line maps to a PO or subcontract line.
3. **Below threshold**: what KAI does with a match it is not allowed to link (**Suggest only, needs review**).
4. **Commercial Date Rules**: **Enforce (block)**, **Warn (allow)** or **Off (no check)** for an invoice dated before its PO, or a claim dated before its subcontract.

When a match falls below the threshold, the invoice shows the KAI suggestion and its confidence with the reason. Use **Accept suggestion**, mark it as having **No PO**, or choose another record.

7. Tips

- **Work your own project.** Set the project filter in the Inbox and the Register to your project, and check **Could not match to project** once a day so nothing sits unowned.
- **Get suppliers to quote the PO number.** An invoice that carries the PO number in the email or on the document matches with high confidence almost every time.
- **Approve the PO first.** Most "can't send" questions are a purchase order still in draft or pending approval.
- **Leave the KAI threshold at 90%** until your team trusts the matches. Lowering it links more invoices automatically, but with less certainty.
- **Use Export for month-end.** Filter to the tab you need (for example **Authorised** or **In Xero**) and click **Export**.

8. Troubleshooting

What you see	Likely cause	Fix
A new invoice is not in the Inbox	The mailbox has not synced yet, or the email went to another mailbox.	Click **Sync now**. Check the email was sent to the connected invoice mailbox.
Project shows as **Likely**	KAI found a project reference but did not link it.	Open the invoice and click **Confirm**, or set the right project.
Invoice is in **Could not match to project**	No project reference or PO number on the invoice.	Open it, set the project, then match the PO or subcontract.
KAI shows a suggestion but did not link it	Confidence below your threshold, or not every line matched a PO line.	Check the reason, then **Accept suggestion** or **Change match**.
The PO is missing from the purchase order list	It is still draft or pending, or it belongs to another supplier.	Tick **Show draft & pending POs**. If it is another supplier's PO, check the supplier on the invoice first. Only an Admin can override.
Send for Authorisation is blocked	A possible duplicate, an unapproved PO, a supplier mismatch or a red identity check.	Read the banner on the invoice. It names the record or check to resolve.
Push to Payment Schedule is greyed out	A required field or the subcontract match is missing.	Hover over the button. The tooltip lists what is missing.
Totals look doubled or short on GST	A line's GST basis does not match the invoice.	Click **Edit** and set each line to **Exc GST**, **Inc GST** or **No GST** as printed.

9. Related features

- **Connect AP Inbox to Deep Space**: connecting the invoice mailbox.

- **Purchase Orders in Deep Space**: raising and approving the POs invoices are matched to.
- **Supplier identity check: ABN and bank details**: the full identity check and verification workflow.
- **Delegation of Authority in Deep Space**: who approves what, and when.
- **Subcontractor Claims & Invoices Walkthrough** and **Accounts Payable in Deep Space (A3)**: the end-to-end AP process.
- **Xero Sync Configuration**: which switch controls what reaches Xero.