

Supplier Matching for EzzyBills API Users:

Generally, by default, EzzyBills extracts the business number (ABN for Australia, VAT number for UK) from the invoice and use Business Number lookup to determine the supplier name for you. If the business number is not extracted from the invoice, we may return an unknown supplier.

To improve supplier identification, if you can upload a list of your supplier to EzzyBills, we will be able to use this list to find a matching one.

EzzyBills will then return the `supplier_id`. Your programmer shall use the following logic

- Call the EzzyBills API to get the Document info. If the Document contains a business number then use that. If it does not, you should look at the `supplierName`. This name will match the ID of the CSV you uploaded. Use this ID to identify who the supplier is in your system.

To use it, please follow the step below to upload your list of suppliers to EzzyBills.

1. Prepare a csv file containing a list of suppliers to EzzyBills, each containing a Business Number. (an example csv file is attached)

In the csv file, the data columns are:

Name,Id,address,region,city,country,postcode,taxNumber,bank_bsb,bank_accou
nt,contact,email,web,phone,fax,type

- For the 2nd column ("Id"), we recommend the ID column to be the same as the 1st column (Name). This way, our API will return the `supplier_id` (as supplier name).
- Alternatively, you can use your supplier ID in this column if you have it. Our ABP will return the `supplier_id` (then you will need to find the supplier name in your system based on this `supplier_id`)

Please note that `bank_bsb` is the supplier's bank BSB number. In many countries, there is no such number. Please keep it empty.

You don't need to have all the columns of data. The first two columns are mandatory, `taxNumber` (business number) is highly recommended, and the address shall match a line of address on the invoice file.

Make sure the supplier data in your list matches exactly or closely to text data on the invoice file.

2. Login to EzzyBills, click **Apps**, click "**Add Contacts**". Follow the instruction there to email the csv file to EzzyBills.

EzzyBills

Dashboard
Search/Approve
Settings
Email
Analysis
Workflow
Apps
Buy
Help

Apps

Download History	Supplier History	Payment List	Statement Reconciliation	Bank Statement	Add Contacts
Price Check	Approval Report	Audit Report	Status Report	Price Check Report	Waiting Approval Report

Description

You can add Contact information (customers, tracking, delivery and branch information). Only required for custom workflows. Existing contacts are removed.

How To?

Send email to: username.App.AddContacts@ezzybills.com

You need to attach a .CSV file with the contact/address information. The format is shown below.

To view the data, click **Apps** again, click “**Download My Data**”, then click the link “**Start Contacts download**”. Then click “**Dashboard**” and then find a recent document tile that in a different colour, mouse over the tile and click to download the data.

(more on next page)

How does EzzyBills determine the supplier with your list?

1. If the business number is extracted from the invoice,
 - First, we will do business number lookup from your list and return the supplier_id data.
 - If we cannot find it in your list, we will use our business number lookup service to find a supplier name for you. If we could not find one, we will return the supplier as unknown.
2. If the business number is not extracted (or there is no business number on this invoice),
 - we can use name matching (based on supplier name, address, phone number, bank account data etc) to find the most suitable one in your list. Make sure the supplier data in your list matches exactly or closely to text data on the invoice file.
 - If the invoice file is a PDF file (not a scan image), you can email to support@ezzydoc.com. We will add a learning rule for supplier name. Once it is added, the name will be used.

Before email, make sure the Business Number was not extracted (login, click Search/Approve to find the invoice with DocID number. On the search result line for the invoice, click “log”, then click “**View Invoice Data**”. Make sure the **Business Number** was empty.

Dashboard

Search/Approve

Settings

Email

Analysis

Workflow

Apps

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Search

Show All

Waiting For Approval

Waiting For Review

Failed

In Progress

Show 10 Docs

20

50

100

Details

Date

DocID

INV# 88001 on 15/09/2020 * from BUNNINGS \$14.92 Tax \$1.36

Uploaded 21 hours ago

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7654_bunnings 1

log

DocID: 9108682

File Name: 7654_bunnings 1 line - simPRO 88001 - Copy.pdf



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[View Invoice Data](#)