

# 2024 R1

## WHAT'S NEW?



Kim  
Dalsgaard  
Christensen  
Chief Commercial Officer



# New 2024 R1 versions available on AppSource!



Automatic document recognition and processing



App-based travel and expense reporting with OCR recognition



Complete payment solution for your financial management



Automatic document distribution in seconds




Process your collections completely automatically



Offers automatic payment import and export application



A young woman with long dark hair, wearing black-rimmed glasses and a brown and white plaid button-down shirt, stands with her arms crossed and a warm smile. She is positioned in a modern office or workspace with a wooden wall and a white shelving unit in the background. A white curved banner is overlaid on the left side of the image, containing text.

# 26.000

Installations in 45+ countries

# Future Valued Solutions



The Swiss Army Knife for the  
demanding Finance department.  
Release Mid/Late April



Big switch to next level Banking solution  
for both local and global environments.  
Release October 2024



Reliable and certified  
carbon reporting.  
Release spring/early summer.







# What's new? 2024 R1

Document Capture



# Mikkel Reesbøll

Global Senior Solution Specialist  
Document Capture



# Roadmap

The screenshot shows the Continia website's documentation page for the 'Detailed Changelog for Continia Document Capture 2024 R1'. The page features a navigation sidebar on the left with a search filter and a list of categories. The main content area includes the article title, a 'Tip' box, a 'Note' box, an 'Important' box, and a table of 'New or changed functionality'. The sidebar and the 'Overview' link in the main content are highlighted with red boxes.

**continia** | Docs Learn Continia Public PartnerZone

Docs Trust Center AppSource

Continia Docs / Continia Document Capture / New and planned / Detailed changelogs / Document Capture 2024 R1

Theme Print Language

Filter by title

- Welcome to Document Capture
- New and planned
  - Overview**
  - General Application
  - Documents and templates
  - Purchase documents
  - Document approval
  - Order and receipt matching
  - Platform and technology
  - Web Approval Portal
  - Country and Regional
  - Previous release plans
- Detailed changelogs
  - Overview
  - Document Capture 2024 R1**
  - Document Capture 2023 R2
  - Document Capture 2023 R1
  - Document Capture 2022 R2
  - Document Capture 2022 R1
  - Document Capture 2021 R2
  - Document Capture 2021 R1
  - Document Capture 2020 R2
  - Document Capture, old versions
  - Document Capture Service
  - Web Approval Portal
  - Continia Delivery Network
  - Document Capture Docs
- Getting started
- Setting up Document Capture
- Business functionality
- Development and administration
- Compliance

## Detailed Changelog for Continia Document Capture 2024 R1

22/03/2024 • 37 minutes to read

This article lists all new features and bug fixes for each version of Continia Document Capture 2024 R1.

**Tip**

As a Continia partner, you can be notified of new Document Capture versions and service packs whenever they're released. To sign up for this service, go to [this page](#) in the Continia PartnerZone (only available to partners).

**Note**

With its 2024 spring release, Document Capture will make a version leap from 12.00 to 24.00, meaning that versions 13.00–23.00 don't exist and never will. This was done in order to align the versioning of Document Capture with that of Microsoft Dynamics 365 Business Central.

**Important**

Currently, Document Capture supports BC v14 and the three latest versions of Business Central. This will change with the release of Document Capture 2025 R1 (26.00) in April 2025. **Document Capture 2025 R1 (26.00) and all future versions from then on will only support the three latest versions of Business Central.**

The next version of Document Capture – Document Capture 2024 R2 (25.00) – will be the last version with support for Business Central April 2019 (BC v14).

### Document Capture 2024 R1

Release date, online: April 2, 2024  
Expected release date, on-premises: April 11, 2024  
App version: 24.0.0

#### New or changed functionality

Functional area	Description	ID
Country and Regional	The SAF-T data model includes reference to the voucher but not the voucher itself. The SAF-T audit file, which can be exported as a Business Central standard feature, will therefore cover the required information, as Document Capture builds on top of the Business Central standard bookkeeping features.	50464





# Document Capture 2024 R1

## Platform and Technology

- Support for Business Central 14, 22, 23, and 24
- Direct upgrade from DC 8, 9, 10, 11. and 12.00
- Added several events
- More external functions
- Enhanced performance
  - Opening the Document Journal
  - Exporting users
  - AU/NZ data center
- Continia Web Approval Portal version 24.0

## General Application

- ✓ Version number update
- Enhanced user experience
  - Open the Document Log from the Document Journal
  - Arrow-key navigation in the Document Journal and Document Card
  - Re-organized actions on the Continia User Setup pages
- Attachments factbox in GL and Purchase Journals
- Updated numerous tooltips
- More teaching tips
- Easier migration from on-premises to online
- ✓ Support for Digital Voucher
- ✓ Data maintenance
  - ✓ Delete recognition data
  - ✓ Delete GDPR data
- Removed User ID in log pages due to GDPR
- ✓ Document Control Log - proactive monitoring
- Support for Microsoft Swiss QR-Bill Management
- Support for Binary Stream's Multi-Entity Management



# Document Capture 2024 R1 continued

## Documents and Templates

- General recognition enrichment
  - Improved AI-recognition
  - Vendor creation priority
- ✓ Continia eDocuments
- Enhanced fraud check
  - Vendor phone number
  - Vendor bank account
- Job No. is renamed to Project No.
- Improved messaging and comments
- Secure Archive supports GL and Purchase Journals

## Documents and Templates

- Enhanced user experience
  - Document Category
  - Document Journal
  - Template Field Card
- More configurable messages
- Amount Distribution on document lines
- Hide/show recognized document lines
- ✓ AI-enhanced line recognition



# Document Capture 2024 R1 continued

## Purchase Documents

- Date/time column in the Document Log Summary
- ✓ Register vendor delivery notes to purchase orders

## Purchase Contracts

- General enhancements
  - Contract fields added to the Web Approval Portal
  - Multiple invoices in same period requires manual approval
  - End Date on purchase contract lines
- Purchase Contracts for North America
- ✓ Automatic invoice comment line
- ✓ Contract administrator permission set
- ✓ Variable invoice amount distribution

## Document Approval

- General enhancements
  - Detailed comment message when rejecting a document
  - XML-embedded files viewable in the Web Approval Portal
- Automatic consecutive approval
- Cross solution overview in the Web Approval Portal

## Order & Receipt Matching

- Match process enhancements
  - Use currency rounding
  - Sharper match comment messaging



# Document Capture 2024 R1 highlights & demonstration

## General Application

- ✓ Version number update
- ✓ Support for Digital Voucher
- ✓ Data maintenance
  - ✓ Delete recognition data
  - ✓ Delete GDPR data
- ✓ Document Control Log - proactive monitoring

## Purchase Documents

- ✓ Register vendor delivery notes to purchase orders

## Purchase Contracts

- ✓ Automatic invoice comment line
- ✓ Contract administrator permission set
- ✓ Variable invoice amount distribution

## Documents and Templates

- ✓ AI-enhanced line recognition
- ✓ Continia eDocuments





**Let's** dig in

# General Application

- Version Number Update
- Digital Vouchers
- Document Control Log
- Data Maintenance



# Version Number Update

The internal version of Document Capture 2024 R1 has been updated to 24 (Document Capture 2023 R2 was 12).

Simplifies which Continia Software solution versions are compatible with Microsoft Business Central.

# Digital Vouchers

In Business Central 23.2 and newer, attaching documentation prior to posting purchase documents and journals, is in certain localizations mandatory.

Document Capture 2024 R1 supports environments where the Enforced Digital Vouchers is activated.

How does it work?

- Registering a purchase document or journal entry automatically adds the primary document and all drag-and-drop attachments to a digital voucher.
- Includes purchase allocations to the digital voucher.
- Associating digital vouchers to purchase allocations is optional, regardless of localization and Business Central version.





# Digital Vouchers

How is the Document Capture feature enabled?

In Business Central 23.2 and newer, the Document Capture digital voucher feature is automatically enabled when both

- Digital Voucher Setup
- Digital Voucher Entry Setup

are configured to check for attachments prior to posting.

The image shows two screenshots from the Microsoft Dynamics 365 Business Central interface. The top screenshot is the 'Digital Voucher Setup' page, showing the 'General' tab with the 'Enabled' toggle switch turned on. The bottom screenshot is the 'Digital Voucher Entry Setup' page, showing a table with the following data:

Entry Type ↑	Check Type	Generate Automatic...	Skip If Manually Added
→ Purchase Document	Attachment	<input type="checkbox"/>	<input checked="" type="checkbox"/>

The image shows the 'Document Capture Setup' page, showing the 'General' tab. The 'Digital Vouchers' section is highlighted with a red box, showing the following configuration:

- Status: Automatically enabled for prim...
- Create for Purchase Al...:



# Digital Vouchers

Special conditions for Denmark apply!

The digital voucher functionality is forcedly enabled from July 1st, 2024, for environments meeting both of the following conditions:

- Business Central 23.2 or newer
- Production environment in Cloud

As a result, Document Capture automatically creates digital vouchers from that date forward.



# Digital Vouchers

What if enforced digital vouchers is not my thing?

Then you go to the

- Document Capture Setup page and activate the option
- Check for attachment before posting of purchase document

This ensures timely notification if a Document Capture file or incoming document is not associated.

The check is imposed both on purchase documents and purchase journals when posting.

The option only applies to Business Central on-premises environments.



# Document Control Log

Introducing the Document Control Log for the Secure Archive.

Vendor No.	Source Document Type	Source Document No.	External Document No.	Source Posting Date	Original Amt. (LCY)	Check Failed (Not Reconc...)	Last Check Performed	Check Fail Message	Failed Check Reconciled
20000	Invoice	108210	44444478	21/01/2018	9,000.00	No	07/04/2024 15:23	4 Document Log Entries.	
20000	Invoice	108211	44444501	22/01/2019	21,000.00	Yes	07/04/2024 15:23	Attachment activity between approval and posting ...	
20000	Invoice	108209	44444444	20/01/2023	5,400.00	No	07/04/2024 15:23	4 Document Log Entries.	
50000	Invoice	108213	1-88888	22/01/2016	6,001.20	No	07/04/2024 15:23	One Document Log Entry	
50000	Invoice	108212	1-77777	19/01/2017	956.40	No	07/04/2024 15:23	One Document Log Entry	

### Create Control Log Entries

**Filter: Limit what invoices and credit memos to include.**

× Posting Date ..... 01/01/24..

☑ Vendor Posting Group .....

+ Filter...

Filter totals by:

+ Filter...

### Document Log Summary - 22/01/19 108211

Show File Email Document Card

No.	Filename	Deleted	Added after posting	Document Category Code	File Hash Check	Imported Date-Time
D000018	3.0.pdf	<input type="checkbox"/>	<input type="checkbox"/>	DRAGNDROP	OK	02/04/2024 15:18
→ D000003	Posted Invoi...	<input type="checkbox"/>	<input type="checkbox"/>	PURCHASE	OK	02/04/2024 10:12

#### Document Activity Log

Entry Text

From: automated\_test@continiaonline.com, Filename: GB - Pur...

The document D000003 was imported.

The document D000003 was registered as Invoice 107214.

The document D000003 registered as Invoice 107214 was post...

#### Emails

From Email Address	Email Subject	File Hash Check
automated_test@continiaonline...	Demo File	OK





# Document Control Log

## What is this Document Control Log?

- Extends the Secure Archive with proactive document checks.
- Highlights documents with a failed file HASH or deleted attachments.
- Reconcile error-prone documents.
- Retrieve related information
  - Find related entries
  - Document Log Summary

## What's in it for me?

- Proactive oversight – Less manual document review.
- Enhanced security – Alerts for failed document checks.
- Maintained integrity - Ensures the document archive reliability .



# Data Maintenance

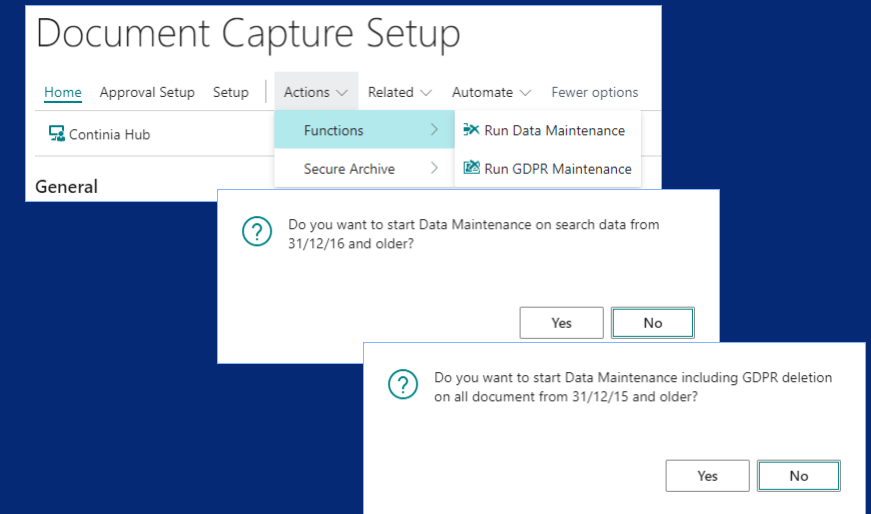
Over time, Document Capture accumulates a generous number of OCR records and files. To maintain high efficiency and GDPR compliance, you can proactively delete old and unneeded data.

What does the Data Maintenance carry out?

- Deletes OCR records (recognized data)
- Purges GDPR related data

Why would I delete Document Capture data?

- Remove old unneeded data to improve the overall performance
- GDPR related data must be hard-deleted after a certain period



# Data Maintenance

Define the Retention Period (years) on the Document Capture Setup page.

- Retention period = Number of closed fiscal years.
- Minimum required value = 2 years

Activate the Run Data Maintenance action in the Document Capture Setup to delete OCR records in the

- Document Word (all records)
- Document Value (captions only)
- and several AI data (all records)

tables for documents older than the retention period specified.



# Data Maintenance

What will this do to my documents?

- Improves field recognition performance for new documents.
- Significantly enhances search speed for more recent documents.
- Deleting historical OCR data compromises the completeness of the Document Search function.

For further details, please see the Continia Docs.



# GDPR Data Maintenance

Define the GDPR Retention Period (Years) on the Document Capture Setup page.

- GDPR retention period = Number of closed fiscal years.
- Minimum required value = 5 years.

Activate the Run GDPR Data Maintenance action in the Document Capture Setup to delete all Document Capture records related to

- registered and posted documents older than the GDPR retention period specified.



# GDPR Data Maintenance

The GDPR maintenance process takes the following in consideration:

- The configured Allow Document Deletion Before date on the Purchases & Payables Setup page.
- The configured Minimum Archive Period in the Secure Archive, if enabled.

For further details, please see the Continia Docs.



# Purchase Contracts

- Automatic Invoice Comment Line
- Contract Administrator Permission Set
- Variable Invoice Amount Distribution





# Automatic Invoice Comment Line

When registering a document based on a purchase contract, you can choose to automatically add an extra comment line in the created invoice.

The comment line is placed under the general comment line that contains the contract number.

Configure whether to include a text recognized from the document or the contract card description.

For further details, please see the Continia Docs.

PC000001 · Office maintenance

Home [Contract](#) | More options

[Dimensions](#) [Statistics](#) [Review Comments](#) [Archive History](#)

**General** Show less

Vendor No. ....	20000	Invoicing Period Code .....	MONTH
Vendor Name .....	First Up Consultants	Currency Code .....	
Description .....	Office maintenance	VAT Liable .....	<input checked="" type="checkbox"/>
Purchaser Code (Reviewer) .....	RB	VAT Area Code .....	CHICAGO, IL
Cost Category Code .....	OFFICES	VAT Bus. Posting Group .....	
Company Code .....		Vendor Contract No. ....	
Customergroup Code .....		Auto Approve Within Variance .....	
Contract Start Date .....	07/04/2024	Create Posting Description Line .....	<input checked="" type="checkbox"/>
Contract End Date .....		<b>Posting Description Line Creation</b>	
Prices Including VAT .....	<input type="checkbox"/>	Posting Description .....	Yes - If Present
Price Type .....	Fixed Amount	Purchase Contract Description .....	<input checked="" type="checkbox"/>



# Contract Administrator Permission Set

A new permission set CDC-PC-ADMIN has been added, replacing the Purch. Contracts Administrator field in the Continia User Setup.

The purchase contract review fields are only visible to users who are assigned the CDC-PC-ADMIN or similar permissions:

- Start Review
- Return to Reviewer
- Finish Review
- Cancel Review

Please note:

After upgrading to Document Capture 2024 R1, all Purchase Contracts administrators must be manually assigned the new permission set.



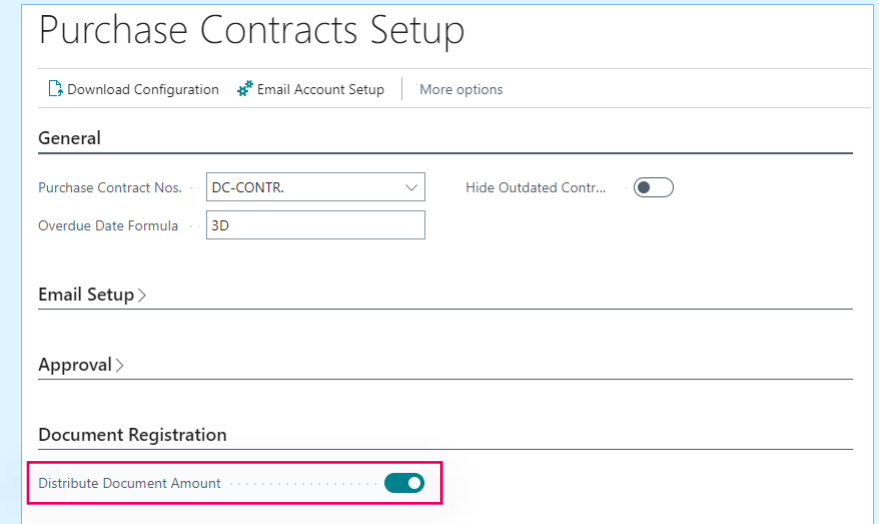
# Variable Invoice Amount Distribution

If an invoice header amount differs from the purchase contract total amount, the invoice amount is distributed according to the contract lines accounts and amount.

How do I enable this?

Activate the setting, Distribute Document Amount, on the Purchase Contracts Setup page, to enable distribution of the invoice header amount.

For new installations, the Distribute Document Amount setting is activated by default.



Purchase Contracts Setup

[Download Configuration](#) [Email Account Setup](#) | [More options](#)

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**General**

Purchase Contract Nos. · DC-CONTR.   Hide Outdated Contr...

Overdue Date Formula · 3D

**Email Setup >**

---

**Approval >**

---

**Document Registration**

Distribute Document Amount



# Variable Invoice Amount Distribution

The document's header amount is distributed across the active purchase contract lines, with the Price Type set to Variable Amount.

Purchase contract lines set to Fixed Amount are transferred to the registered invoice with their contract line amounts.

## **What's in it for me?**

- Smart distribution– automatic handling of variable amounts.
- Enhanced accuracy - precise distribution of invoice amounts.
- Improved efficiency - reduce manual reconciling of invoices and contracts.



# Purchase Documents

- Register and Post Delivery Notes



# Register and Post Delivery Notes

Introducing vendor delivery note in the Purchase Order category.

Match vendor delivery notes to your open purchase orders for automated delivery registration.

What can you carry out?

- Update the Quantity to Receive field on the purchase order
- Post the purchase receipt

**What's in it for me?**

- Faster processing - save time
- Reduce typos – accurate inventory



# Documents & Templates

- AI-enhanced line recognition
- Continia eDocuments





# AI-enhanced Line Recognition

Building on top of line data captured by AI, Document Capture is capable of automatically capturing more document line content.

The following features are available to customers using the Cloud OCR engine with AI recognition capabilities:

- AI-based assistant notifying you about recognition suggestions
- Combine AI with manual capture

Over the next three months, existing customers using Cloud OCR without AI will gradually be granted access to the AI recognition features.

For further details, please see the Continia Docs.



# AI-enhanced Line Recognition

The line recognition functionality for all users of Continia Document Capture has been significantly enhanced.

- Add/remove line fields without reopening the Document Card page
- Capture lines spanning multiple document rows
- Column caption for variable line structures
- Field captions at line level
- Relative line capture (without a caption)
- Handle empty values
- Capture specific line field data matching RegEx field rules

Replaces custom extensions e.g. Advanced Line Recognition from GitHub.



# AI-enhanced Line Recognition

The new and enhanced line features are only available with the new CDC Line Capture 2.0 codeunit. All newly created templates uses this codeunit by default.

Existing templates will retain the older codeunit.

Assign the new codeunit to existing templates on your own responsibility.

Switching the codeunit may affect the results and quality of the line capture.

Reapply the older codeunit to restore previous functionality.

How do I update the codeunit on existing templates?

1. Open the template card
2. Go to the Codeunits FastTab
3. Check the codeunit displayed under Line Capture.

For further details, please see the [Continia Docs](#).



# Continia eDocuments

## What is Continia eDocuments?

- A central platform for managing electronic documents (XML)
- Continia Delivery Network
- Incoming and outgoing documents

## How to get started!

- Automatic configuration
- Easy CDN onboarding
- Included in Essential

For more information see Continia Docs or the Continia benchmark sheet for a detailed feature comparison with Microsoft e-documents.

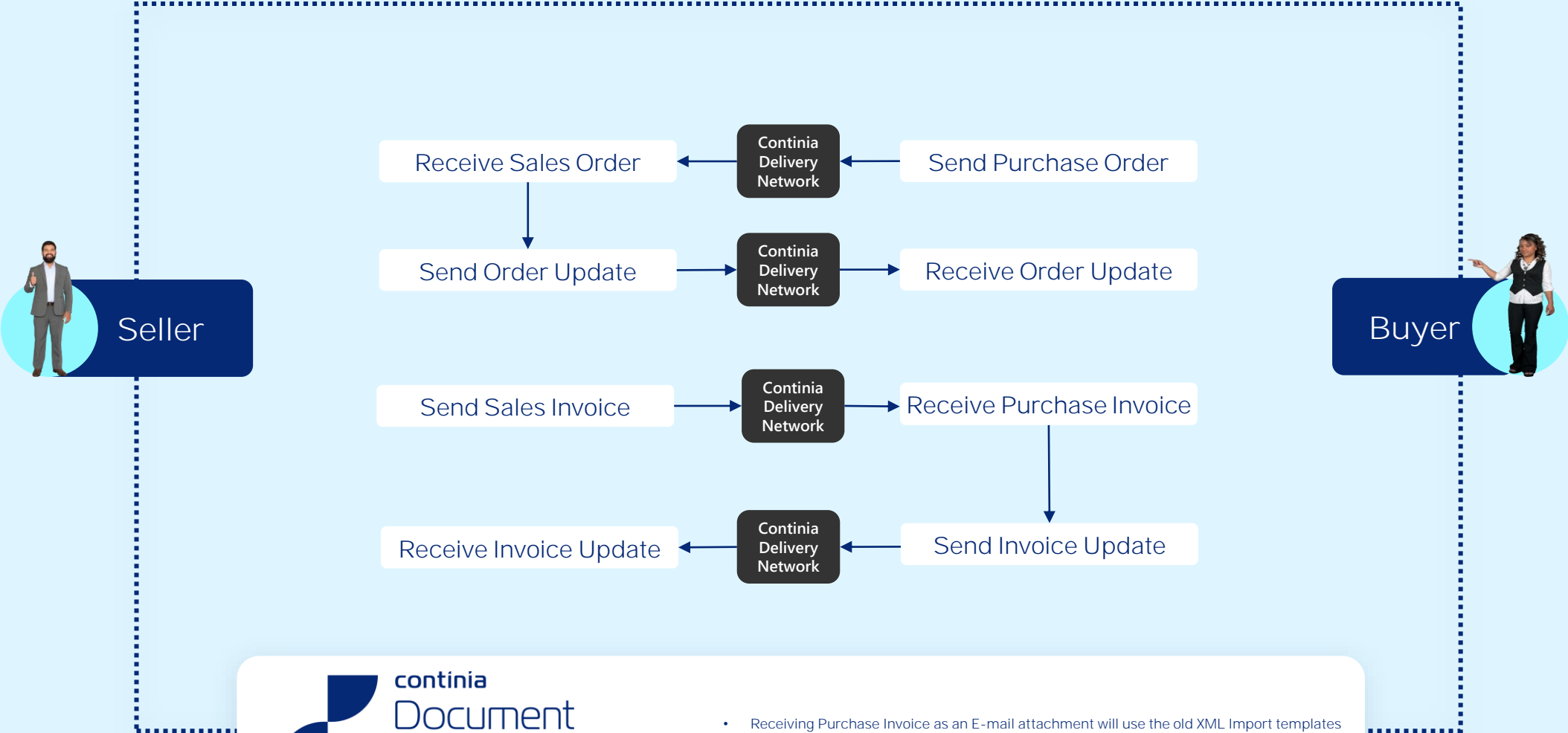


# Continia eDocuments

Presented by Engineering Manager Cristian Mocanu.



# Continia eDocuments



• Receiving Purchase Invoice as an E-mail attachment will use the old XML Import templates

# Document Capture 2024 R1 highlights & demonstration

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## Purchase Contracts

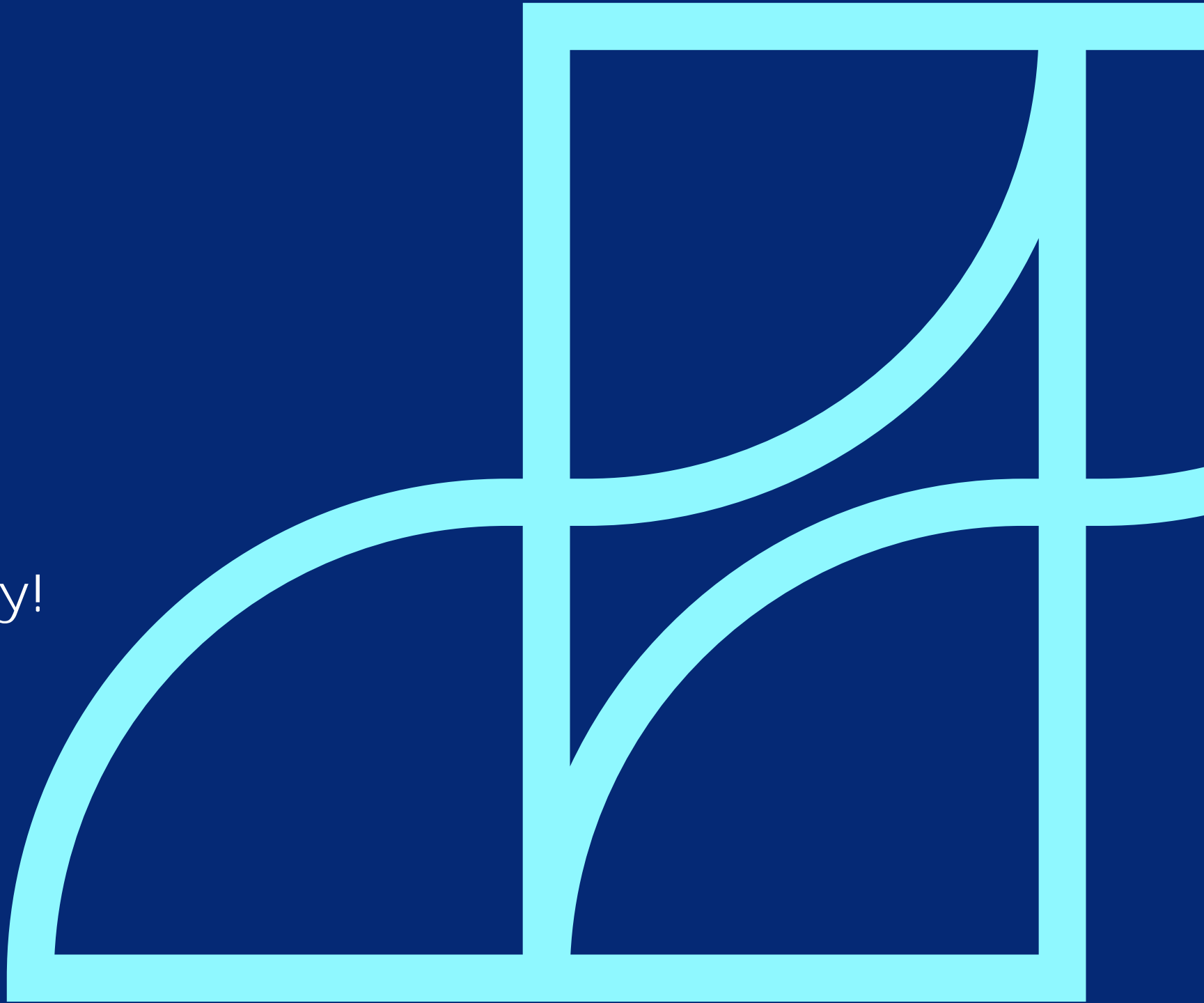
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- ✓ Contract administrator permission set
- ✓ Variable invoice amount allocation

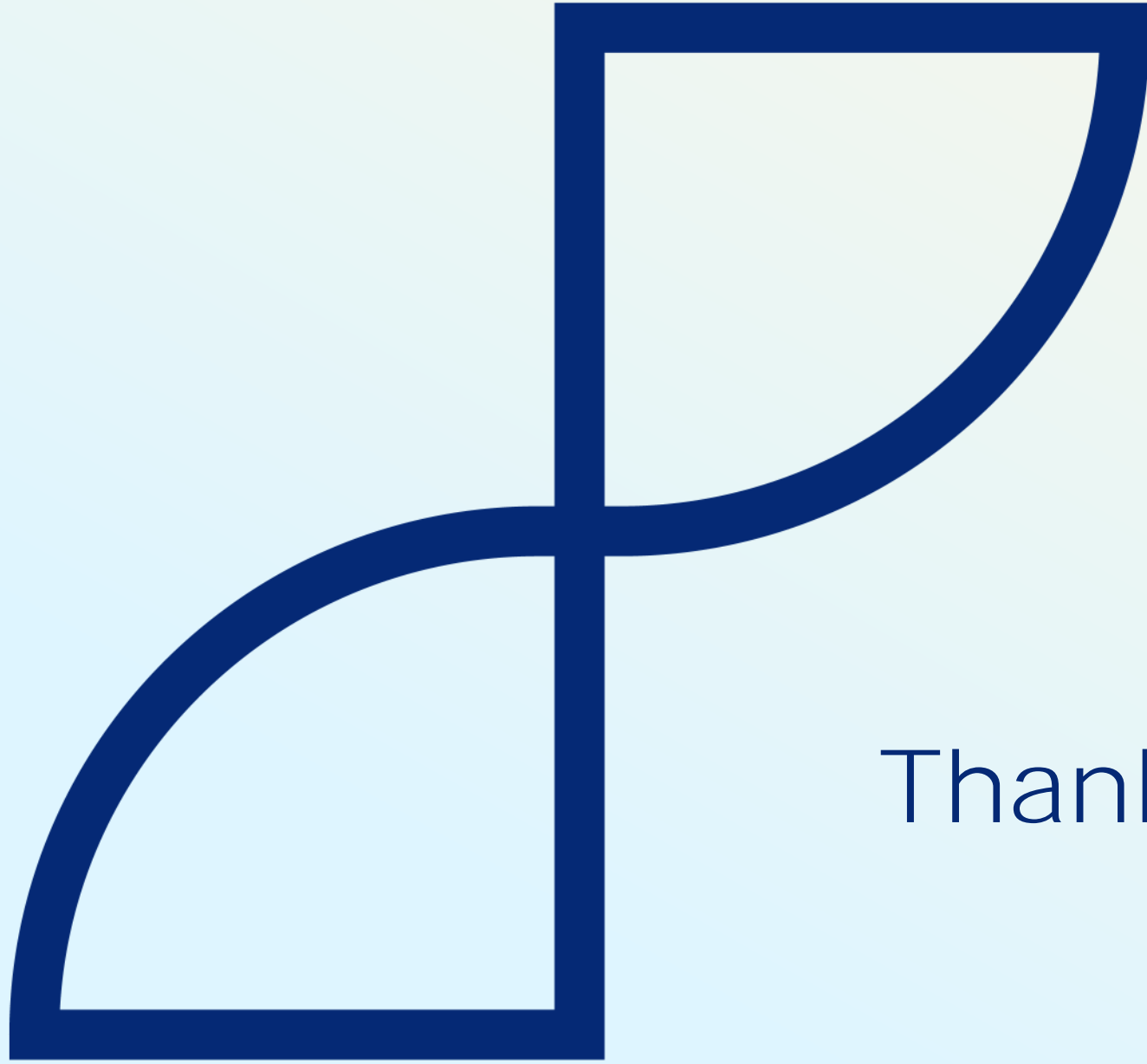




# Q&A

Curious? Ask away!





Thank you for joining!