

# How to review AI-generated Incoming invoices and POD/CMR documents?

Incoming invoices created automatically from emails processed by the Cloudex TMS AI mailbox must be reviewed before they are confirmed.

During the review, check:

- the information read from the supplier invoice;
- whether the invoice is related to the correct Trip/Spedition;
- whether the invoice amounts are correct;
- whether POD/CMR documents are attached to the correct Client order.

## When to use

Use this procedure when an Incoming invoice has been automatically created from an email received in your **AI incoming-invoice-reading email**.

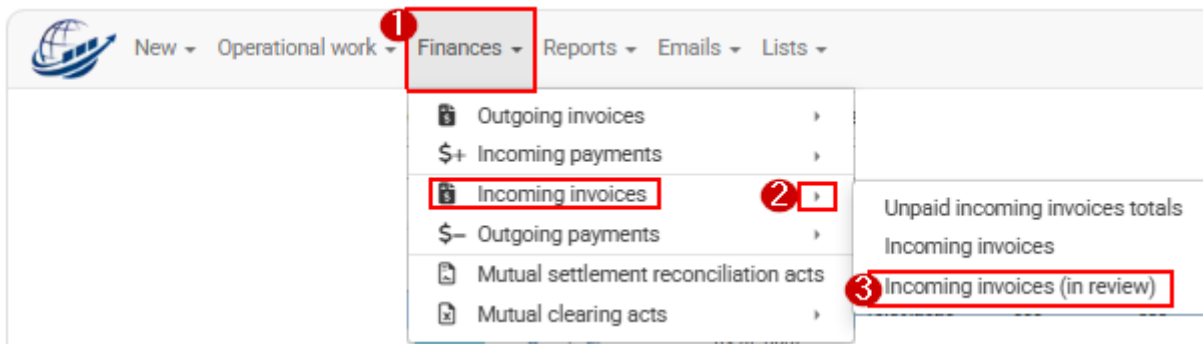
All invoices created by AI that still require user validation can be found under:

**Finances → Incoming invoices → Incoming invoices (in review)**

## How to review an AI-generated Incoming invoice

### 1. Open the invoice

Go to: **Finances → Incoming invoices → Incoming invoices (in review)**



You will see Incoming invoices created by AI that still need to be reviewed.  
Open the invoice you want to review.

| New ▾ Operational work ▾ Finances ▾ Reports ▾ Emails ▾ Lists ▾                    |          |               |           |                       |                |                 |              |            |                |               |               |                               |
|-----------------------------------------------------------------------------------|----------|---------------|-----------|-----------------------|----------------|-----------------|--------------|------------|----------------|---------------|---------------|-------------------------------|
| Unpaid incoming invoices totals Incoming invoices Incoming invoices (in review) 4 |          |               |           |                       |                |                 |              |            |                |               |               |                               |
| Q Search Selected all Selected all                                                |          |               |           |                       |                |                 |              |            |                |               |               |                               |
|                                                                                   | Number ▾ | Invoice No. ▾ | Status ▾  | Supplier ▾            | Invoice date ▾ | Received date ▾ | Total [bc] ▾ | Sum [bc] ▾ | VAT sum [bc] ▾ | Description ▾ | Reviewed by ▾ | Notes ▾                       |
| <input checked="" type="checkbox"/>                                               | 645      | 19031         | In review | Cloudex SIA           | 09.09.2026     | 10.09.2026      | 605          | 500        | 105            | TL26-005      | Harper Daniel | Payment term: 16.1 10.09.2026 |
| <input type="checkbox"/>                                                          | 634AE    | 4384004       | In review | Scania Finans         | 04.05.2026     | 07.08.2026      | 103349.56    | 88135.27   | 15214.29       |               | Harper Daniel | *(AI) 07.08.2026              |
| <input type="checkbox"/>                                                          | 635AE    | 70440145      | In review | Stena Line Baltic A/S | 02.05.2026     | 07.08.2026      | 644.62       | 644.62     | 0              | [244448]      | Harper Daniel | *(AI) 07.08.2026              |
| <input type="checkbox"/>                                                          | 558      | 0qweqwe       | In review | Ito latvia            | 28.02.2025     | 28.02.2025      | 0            | 0          | 0              | E102          | šurika Māreks | 28.02.2025                    |

## 2. Open the invoice attachments

In the upper-right corner of the Incoming invoice, click the **Attachments** icon.

Incoming invoices: 645 In review

SmartCargo L...
Show/Hide attachments

Received date \* 10.09.2026 Type Invoice
Invoice No. \* 19031 Invoice Date \* 09.09.2026

The attachments received with the original email will be displayed.

Usually, the email contains:

- the supplier's invoice PDF;
- one or more POD/CMR documents related to the shipments included in the invoice.

## 3. Compare the AI-generated invoice with the original invoice

Select the original invoice attachment.

Cloudex TMS allows you to review the information side by side:

- the Incoming invoice created by AI;
- the original invoice received from the supplier.

Check that the information read by AI is correct.

Pay particular attention to:

- supplier;
- invoice number and date;
- currency;
- invoice amounts and VAT;
- payment information;
- related Trip/Spedition.

Correct any information if necessary.

“ **Important:** AI helps automate invoice data entry, but the user is responsible for reviewing the information before confirming the invoice.

The screenshot displays the SmartCargo interface for reviewing an incoming invoice. On the left, the 'Incoming invoices: 645' section shows the invoice details: Received date 10.09.2026, Invoice No. 19031, Supplier Cloudex SIA - LV401, Bank account LV27HABA05 HABALV22 Swedbank AS, Payment terms 35 days, Due date 16.09.2026, and Description TL26-005. A table below lists the invoice items, with one item highlighted: Freight Order No. TL26-005. The right side shows the PDF of the invoice, 'Invoice Nr. 19031' dated 09.09.2026, issued by SmartCargo Logistics GmbH. The PDF includes the supplier's details, payment terms, and a table of items. A red arrow points from the 'TL26-005' entry in the left table to the corresponding item in the PDF.

| No.                 | Item description           | Price  | Quantit y | Unit | Sum, EUR                      |
|---------------------|----------------------------|--------|-----------|------|-------------------------------|
| 1                   | Freight Order No. TL26-005 | 500,00 | 1,00      | gab. | 500,00                        |
| Total               |                            |        |           |      | 500,00                        |
| V.A.T. 0%           |                            |        |           |      | 0,00                          |
| <b>Total amount</b> |                            |        |           |      | <b>500,00</b>                 |
|                     |                            |        |           |      | Five hundred euro and 0 centi |

## Review POD/CMR attachments

After checking the invoice, review the POD/CMR documents received with the email.

The invoice PDF should remain attached to the **Incoming invoice**.

POD/CMR documents should normally be attached to the corresponding **Client order**.

## 4. Check where the POD/CMR is attached

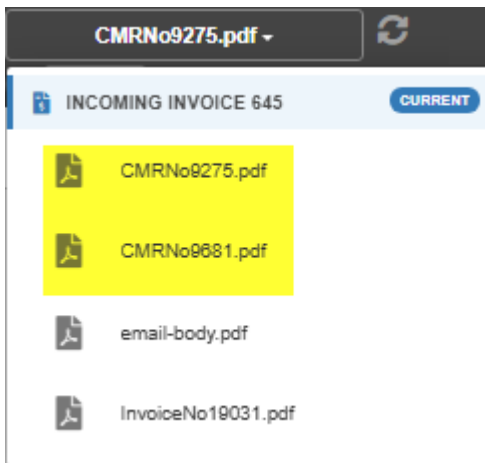
In the attachment list, check whether the POD/CMR file is shown under:

**Incoming invoice** or **Client order**

If the POD/CMR is already attached to the correct Client order, no action is required.

If the POD/CMR is shown under **Incoming invoice**, Cloudex TMS or AI was not able to determine the correct Client order automatically and the document must be moved manually.

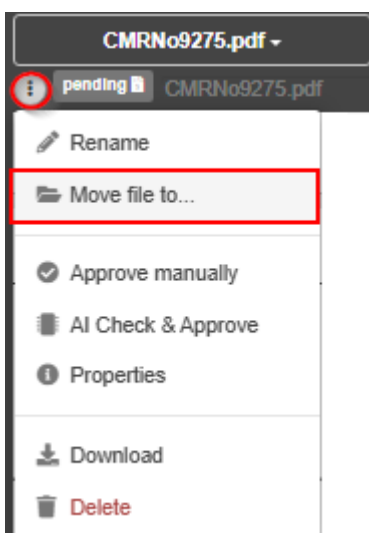
This can happen, for example, when one carrier invoice contains costs for several shipments.



## 5. Move the POD/CMR to the correct Client order

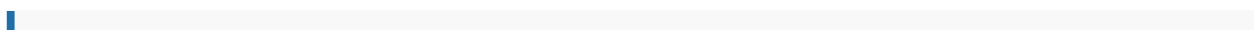
Find the POD/CMR attachment.

Click the **three-dot (...)** menu next to the file and select: **Move file to**



Select the appropriate **Client order**.

After moving the file, it will be displayed in the attachments list as a **Client order attachment**.



**Important:** Make sure you select the correct Client order before moving the document, especially when the Trip/Spedition contains several shipments.

CMRNo9275.pdf

UPLOAD

+ Browse .. or drop

pending CMRNo9275.pdf

1 of 1

1. Absender (Name, Anschrift, Land)  
Sender (Name, Address, Country)  
**La systems GmbH**  
LetteStrasse 30  
DE-5202, Berlin, VÄCIJA

International Consignment Note  
This carriage is subject, notwithstanding any clause to the contrary to the Convention on the Contract for the International Carriage of goods by road (CMR).  
**CMR No. 9275**

2. Empfänger (Name, Anschrift, Land)  
Consignee (Name, Address, Country)  
**Honda SIA**  
Rue Charles Fridrich  
FR-54500, Vandoeuvre-l?s-Nancy, FRANCIJA

16. Frachtführer(Name, Anschrift, Land)  
Carrier (Name, Address, Country)  
SmartCargo Logistics  
Albert street 18  
DE-106767, Berlin, VÄCIJA  
+371 2933 1270; www.ozols.lv

**Move attachment - CMRNo9275.pdf**

Move from

Incoming invoice 645 (#19031) 10.09.2026 Cloudex SIA  
Document type Document No. Date Supplier

Move to Order Search

1 9275 Nordic Freight AB La systems GmbH DE-5202 02.09.2026 Honda SIA FR-54500 06.09.2026 16EPLL; 6.40LDM;

9681 Ekg cargo LV-2101 06.09.2026 Ab medical group rig LV-1073 06.09.2026 1EPLL; 0.40LDM;

The attachment will be removed from the current document and attached to the selected destination.

2 Move attachment Cancel

After you move POD/CMR to appropriate Client order in Invoice attachment list it will show as Client order attachment

CMRNo9275.p

↺

UPLOAD ▾

INCOMING INVOICE 645

CURRENT

CMRNo9681.pdf

email-body.pdf

InvoiceNo19031.pdf

CLIENT ORDER 9275

CMRNo9275.pdf

## 6. Review and approve the POD/CMR

Open the POD/CMR document and check that it belongs to the selected Client order.

Approve the POD/CMR if the document is correct.

An approved POD/CMR can then be used in the Client order invoicing process and, when automatic invoice sending is configured, can be included with the outgoing invoice.

CMRNo9275.p

↺

UPLOAD ▾

+ Browse

↗

pending

CMRNo9275.pdf

.. or drop

1 /

Status: Pending

Click to approve manually

|                                                                                                                                                                        |                                                                                                                                                                                                          |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. Absender (Name, Anschrift, Land)<br>Sender (Name, Address, Country)<br><br><b>La systems GmbH</b><br>LetteStrasse 30<br>DE-5202, Berlin, VÄCIJA                     | <b>International Consignment No</b><br><br>This carriage is subject, notwithstanding any clause to the contrary to the Convention on the Contract for the International Carriage of goods by road (CMR). |
| 2. Empfänger (Name, Anschrift, Land)<br>Consignee (Name, Address, Country)<br><br><b>Honda SIA</b><br>Rue Charles Fridrich<br>FR-54500, Vandoeuvre-l?s-Nancy, FRANCIJA | 16. Frachtführer(Name, Anschrift, Land)<br>Carrier (Name, Address, Country)<br><br><b>SmartCargo Logistics</b><br>Albert street 18<br>DE-106767, Berlin, VÄCIJA<br>+371 2933 1270; www.ozols.lv          |
| 3. Auslieferungsort des Gutes<br>Place of delivery of the goods<br><br><b>Honda SIA</b><br>Rue Charles Fridrich, FR-54500 Vandoeuvre-l?s-Nancy<br>GPS: 48.6604, 6.1905 | 17. Nachfolende frachtführer (Name, Anschrift, L<br>Successive carriers (name, address, country)<br><br><b>Cloudex SIA</b><br>Dižozolu iela 33<br>LV-3018, Iecēni, Cenu pag., Jel                        |

# Confirm the Incoming invoice

After you have:

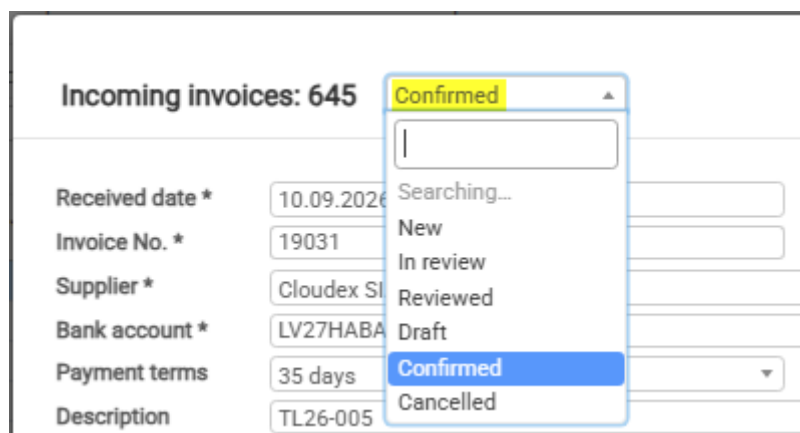
- checked the invoice information;
- verified the related Trip/Spedition;
- checked the invoice amounts;
- moved POD/CMR documents to the correct Client orders where necessary;
- reviewed and approved the POD/CMR documents;

change the Incoming invoice status from:

**In review → Confirmed**

Click **Save**.

The AI-generated Incoming invoice has now been reviewed and confirmed.



The screenshot shows a web interface for managing incoming invoices. At the top, it says "Incoming invoices: 645". Below this is a table of invoice details. A dropdown menu is open, showing the current status "Confirmed" and a list of other possible statuses: "New", "In review", "Reviewed", "Draft", "Confirmed" (highlighted), and "Cancelled".

| Incoming invoices: 645 |            |
|------------------------|------------|
| Received date *        | 10.09.2026 |
| Invoice No. *          | 19031      |
| Supplier *             | Cloudex SL |
| Bank account *         | LV27HABA   |
| Payment terms          | 35 days    |
| Description            | TL26-005   |

## Related topics

- [How to set up an AI mailbox for incoming invoice reading](#)
- [How to pay Incoming invoices?](#)
- [How to send outgoing invoices automatically](#)

Revision #11

Created 2026-09-10 08:51:16 UTC by Admin

Updated 2026-09-15 06:46:14 UTC by Admin