

InboxFlow — User Guide

Vendor and customer documents from email into SAP Business One

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What InboxFlow does

Vendors and customers email you documents every day: quotes, invoices, purchase orders, remittances and returns. InboxFlow reads those emails and matches the sender to the right SAP Business One business partner and contact. It then creates the matching SAP document through the Service Layer.

Early release (October 2026): this release covers:

- accounts and sign-in,
- the SAP connection,
- **business-partner and contact sync**,
- mailbox settings,
- users, branding, email and support.

Reading mail, document review and posting to SAP arrive in the next releases. They are described under [Coming next](#) so you can plan ahead.

Roles

Role	Can do
Admin	All of Setup: connections, mailboxes, users, billing
Reviewer	Confirms documents and saves mappings; edits email templates
Viewer	Read-only

Signing in

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SIGN IN

Sign in to InboxFlow

Vendor and customer documents from email into SAP Business One.

EMAIL

PASSWORD

 Sign in

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SIGN IN TO INBOXFLOW.

Sign in with your email and password, or with your company's Microsoft, Google or Keycloak single sign-on. The first time, you set your own password.

The dashboard

Card	Shows
Licence	Your plan and seats (admins only)
SAP Business One	The connected company, or <i>Not connected</i> — <i>add it in Setup > Connections</i>
Partner sync	<i>Every N min, Manual</i> or <i>Failing</i> , and when it last ran
Documents	Documents read from your mailboxes (available when mail reading is released)

If the partner sync fails, a red **Sync is failing** banner explains why.

Setting up InboxFlow

Follow the **Setup & Administration Guide** for the standard tabs. InboxFlow connects **one SAP company** per licence by default.

1. **Connections:** add your SAP company and click **Test**. Then run **Sync now** under *Business partner sync*.
2. **Sync:** turn on **Auto-sync**, set the **Interval (minutes)** and click **Save schedule**. The status shows *Autosync healthy, stale or error*.
3. **Mailboxes:** add the mailbox InboxFlow will read (see below).
4. **Users:** add reviewers and viewers.
5. **Branding, Email SMTP and Email templates.** The *contact approval* email is the one InboxFlow sends today.
6. **Billing:** subscriptions are arranged through **Support** while per-flow pricing is introduced.

Mailboxes

- **IMAP mailbox:** enter a **Label**, the **Host**, **Port**, **Username**, **Password** and **Folder**, and tick **Use SSL**. Click **Test**, then **Save**.
- **Google Workspace:** connect a Gmail mailbox with read-only access, using your Google client ID and secret. *Google sign-in for mailboxes is being completed in the next release.*

Use a dedicated address such as `ap@yourcompany.com` or `orders@yourcompany.com`. Ask vendors and customers to send documents there.

Coming next

The sections below describe how InboxFlow will work once mail reading and posting are released.

How a document is handled

1. **An email arrives** and InboxFlow matches the sender:
 - **Known contact:** the document is linked to that contact and their business partner.
 - **New address on a known domain:** InboxFlow creates a *pending* contact and emails your admins an approval link, valid for 7 days. Accepting it creates the contact in SAP.
 - **Unknown domain:** the document waits for a reviewer to map it.
2. **Reading:** the attachment is read (text PDFs directly, scans by OCR).
3. **Matching:** InboxFlow looks for a saved mapping. It checks the same contact first, then the same business partner, the same domain, your company's library, and finally the shared templates.
4. **AI assist:** if no mapping fits, an assistant suggests the document type and fields. External AI is used only if your company opts in.
5. **Review:** a **reviewer** confirms or corrects the fields and saves the mapping, so the next document from that sender goes through on its own.
6. **Posting:** the SAP document is created. InboxFlow checks SAP first so a document can never post twice.

Flows

Each *flow* is one type of SAP document. You subscribe per flow.

From vendors	Becomes in SAP
Quote	Purchase Quotation
Advance shipping notice	Goods Receipt PO (draft)
Invoice	A/P Invoice
Down-payment request	A/P Down Payment Request
Credit memo	A/P Credit Memo
Return authorization	Goods Return Request

From customers	Becomes in SAP
Request for quote	Sales Quotation (draft)
Purchase order	Sales Order
Payment remittance	Incoming Payment
Return request	Return Request