CYGENIX SOLUTIONS

Cygenix ScanLink User Guide

AI document reading for AutoCount Accounting — the desktop Connector and the Phone App.

Version 1.0.13 | For AutoCount Accounting 2.x
Screens shown use sample company data.

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1. What is Cygenix ScanLink?

Cygenix ScanLink reads your supplier and customer documents with AI and prepares them for **AutoCount Accounting**. Instead of typing an invoice in line by line, you send in a photo or a scan; ScanLink reads it, you check it, and one click posts it into AutoCount.

1. Send — Scan, photo, PDF or a typed message → **2. AI reads** — Supplier, dates, items, amounts → **3. You check** — Match to AutoCount, fix anything → **4. Import** — Posted into AutoCount

ScanLink has two parts that work together:

- **The Connector** — a Windows program installed next to AutoCount. This is where documents are reviewed and imported into AutoCount.
- **The Phone App** — a web page on your phone (no app store needed). Take photos of documents, review and approve them, look at reports, and get notified when documents are ready.

Documents ScanLink can handle

Purchases	Sales	Cash book
Purchase Invoice	Sales Invoice	Cash Receipt
Purchase Order	Sales Order	Cash Payment
Goods Received Note	Sales Quotation	
Purchase Return	Delivery Order	
	Sales Credit Note	

> **Your licence decides** which of these are switched on, how many documents you can process each month, how many companies (databases) and how many phones you can connect.

2. What you need

- A Windows PC that runs **AutoCount Accounting 2.x** (the PC where you normally post documents).
- The SQL Server login and the AutoCount user name and password you use for your account book.
- An internet connection (documents are read by Cygenix's secure server).
- **Windows 10 or Windows 11** for PDF features such as reading e-Invoice QR codes from PDFs and splitting scanned PDFs.
- A Cygenix licence for your AutoCount database. Your dealer registers it for you or guides you through **Register Database**.
- For the Phone App: any modern phone with a camera and a web browser (Safari, Chrome).

3. Installing the Connector

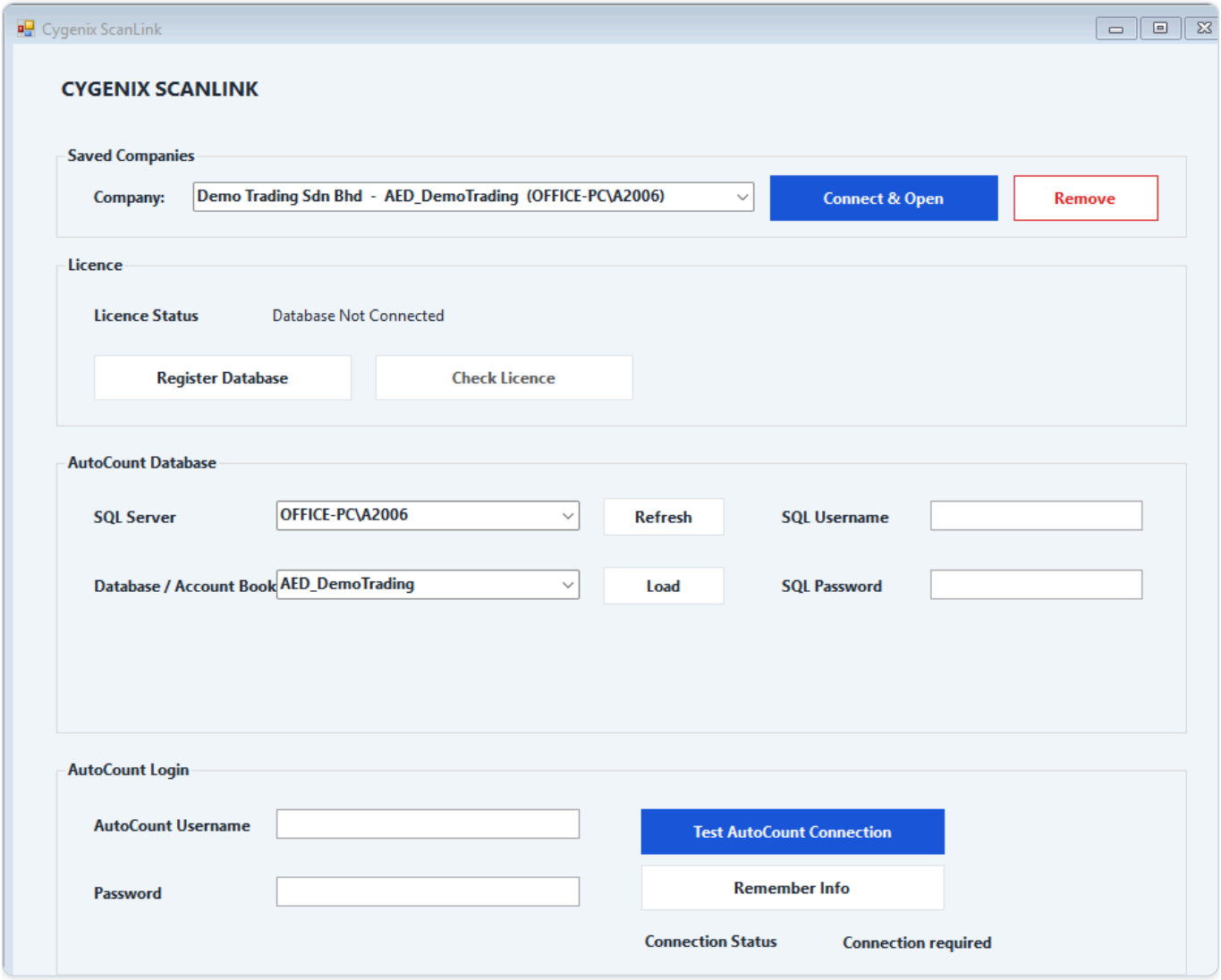
1. Copy the installer folder (or unzip the file you received) to the PC.

2. Double-click `CygenixInstallLauncher.exe`. **Do not run the .msi file directly.**
3. If an older version is installed, the launcher offers to remove it first — click **Yes**. Your saved logins and settings are kept.
4. Follow the on-screen prompts. When it finishes, open **Cygenix ScanLink** from the Start menu.

> **Updating later:** run the new installer the same way. The Connector also tells you when a new version is available.

4. First-time setup: connect and register

When you open ScanLink you see the login window. It connects to your AutoCount account book and checks your Cygenix licence.



The login window (sample company).

Connect to AutoCount

1. **SQL Server** — pick your server from the list (click **Refresh** to search the network) or type it.
2. Enter the **SQL Username** and **SQL Password**, then click **Load** to list the account books. Choose yours under **Database / Account Book**.
3. Under **AutoCount Login** enter your normal AutoCount user name and password.
4. Click **Test AutoCount Connection**. You should see “Connected successfully”.
5. Click **Remember Info** so you do not have to type this again. Passwords are stored encrypted on this PC only.

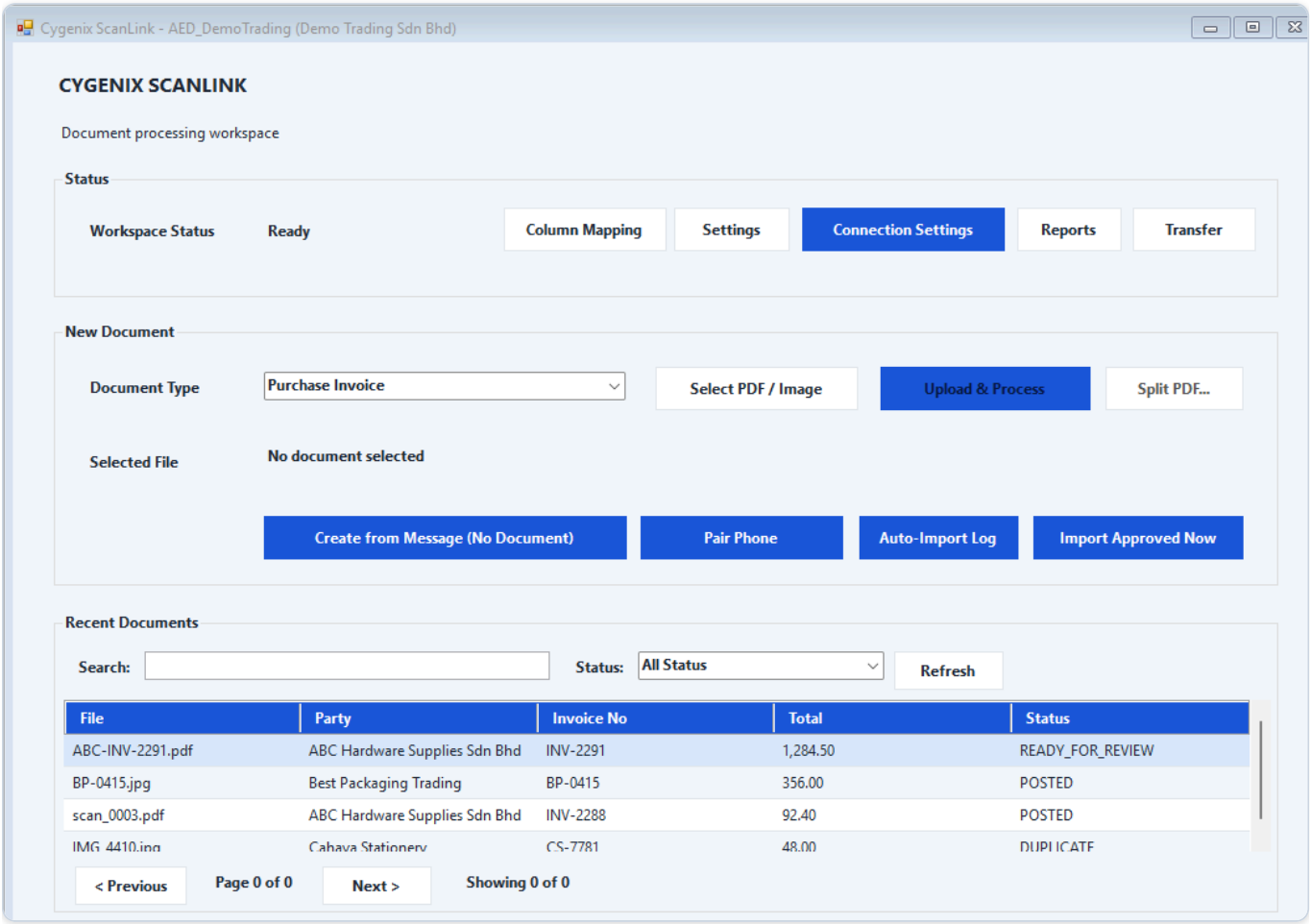
Register your database (first time only)

Click **Register Database**. Your dealer approves the request, after which **Licence Status** shows **ACTIVE**. Next time, just click **Check Licence** — the Documents workspace opens when the licence is valid.

> **Tip:** you only register once per AutoCount database. If you work with several companies, see chapter 10.

5. The Documents workspace

This is the main screen. Everything starts here.



The Documents workspace. Recent documents and their status are listed at the bottom.

Button	What it does
Document Type	Choose what you are sending (Purchase Invoice, Sales Invoice, ...). Only types in your licence appear.
Select PDF / Image	Pick one or **several** files (PDF, JPG, PNG) from the PC.
Upload & Process	Sends the selected file(s) to be read. With several files they are sent one after another and you get one summary.
Split PDF...	Appears for a single PDF. Cuts a scanned batch into separate documents (chapter 6).
Create from Message	Make a draft by typing what the document says — no file needed.

Pair Phone	Connects a phone to this company (chapter 11).
Auto-Import Log	Shows what the automatic import and the scan folder did.
Import Approved Now	Posts every approved document into AutoCount right now, after showing you what will be imported.
Column Mapping	Lets you manage how supplier item codes are matched to your AutoCount items.
Settings	Licence details, scan folder, automatic import (chapter 12).
Connection Settings	Go back to the connection window.
Reports / Transfer	Reports and document transfer (chapter 9).

Document status

Status	Meaning
READY_FOR_REVIEW	Read by the AI. Waiting for you to check it.
APPROVED	You (or someone on the phone) approved it. Waiting to be imported.
POSTED	Imported into AutoCount. The AutoCount document number is shown.
DUPLICATE	ScanLink thinks it was already processed.

Double-click a document in the list to open it. Use the **Search** box and **Status** filter to find documents.

6. Sending documents in

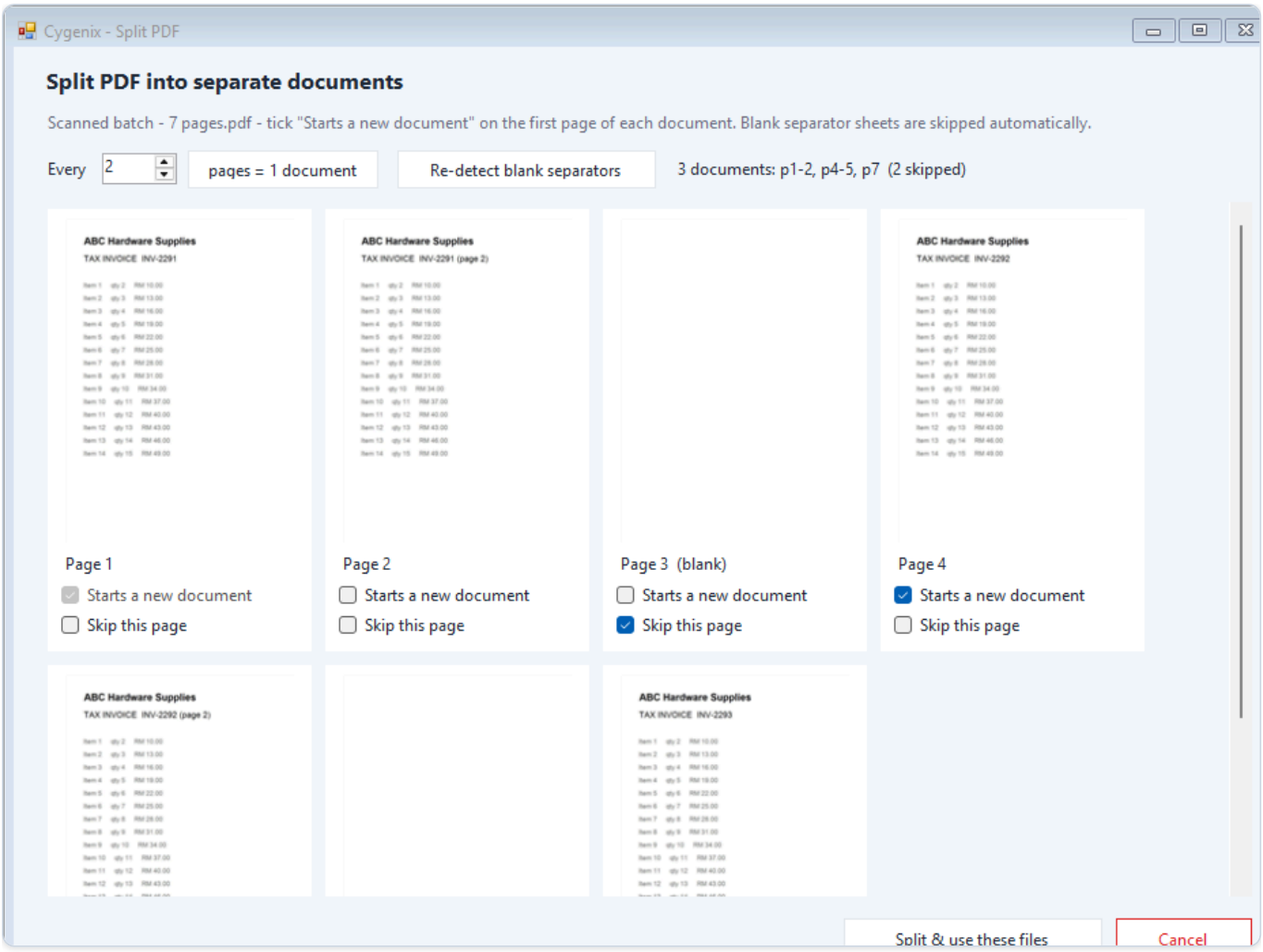
From a file

1. Choose the **Document Type**.
2. Click **Select PDF / Image** and pick the file(s). Hold `Ctrl` or `Shift` to pick several.
3. Click **Upload & Process**. After a few seconds the document appears in **Recent Documents** as READY_FOR_REVIEW.

> **Batch upload:** if a file fails, the others still go through. Files that did not upload stay selected so you can try again without sending the good ones twice.

Split a scanned batch PDF

If you scanned a pile of invoices into **one PDF**, select it and click **Split PDF...**. Page previews open:



Blank separator sheets are skipped automatically; each new document starts where “Starts a new document” is ticked.

- Blank sheets between invoices are **detected and skipped**; the page after one starts a new document.
- Tick **Starts a new document** on the first page of each invoice, or use **Every N pages = 1 document**.
- Tick **Skip this page** for pages you do not want to send.
- Click **Split & use these files**, then **Upload & Process** sends them as separate documents.

> The split files are image-based PDFs, like scanner output. The AI reads them just as well, but they have no selectable text.

From a message (no document)

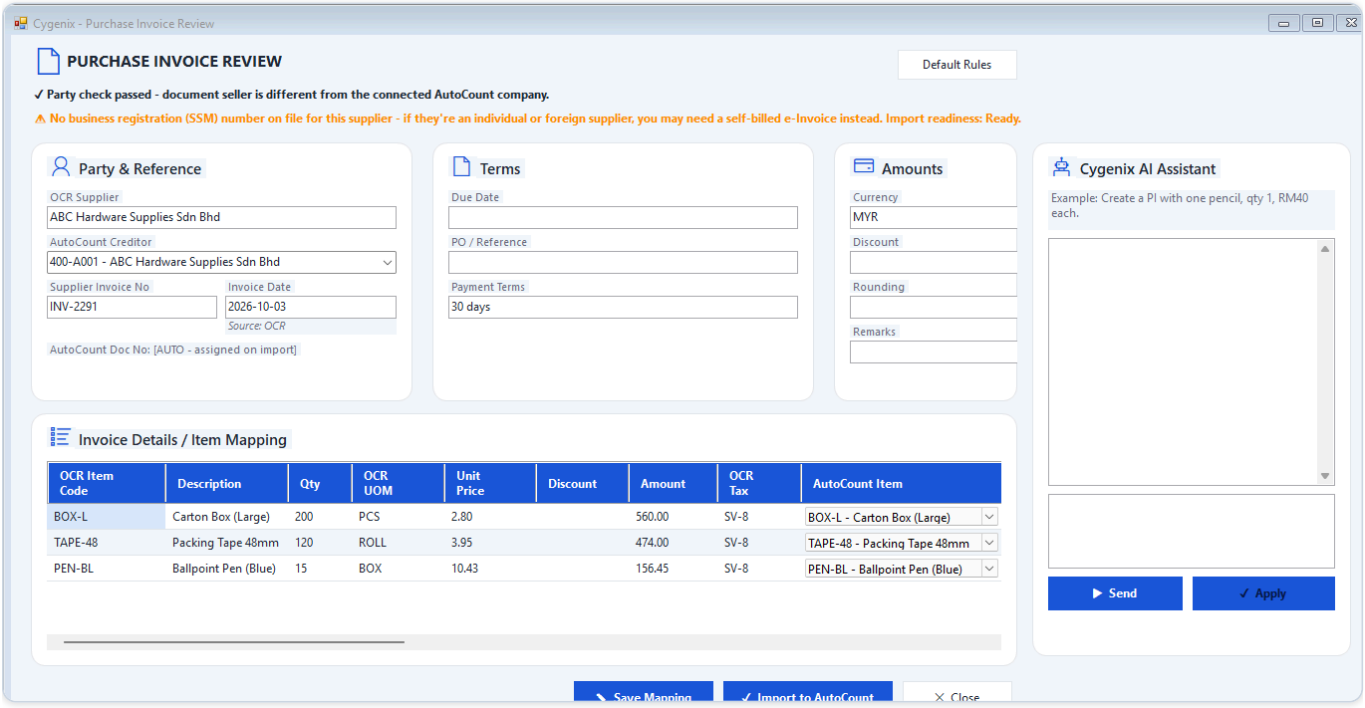
Click **Create from Message** and describe the document, e.g. *“Create a purchase invoice from ABC Supplier, 2 boxes of pens at RM40 each.”* A draft is created for you to check. (Credit notes and purchase returns need a real document because they refer to an original invoice.)

e-Invoice QR codes

When you send an image or PDF that carries a Malaysian **e-Invoice QR code**, ScanLink reads it and shows you the MyInvois link so you can verify the invoice with one tap. It is a convenience link only — ScanLink does not decide whether the invoice is valid.

7. Reviewing and importing into AutoCount

Open a READY_FOR_REVIEW document to see the review screen. The left side shows what the AI read; you match it to AutoCount and fix anything wrong.



Purchase Invoice review. The orange line is a warning; the table below maps each line to an AutoCount item.

What to check

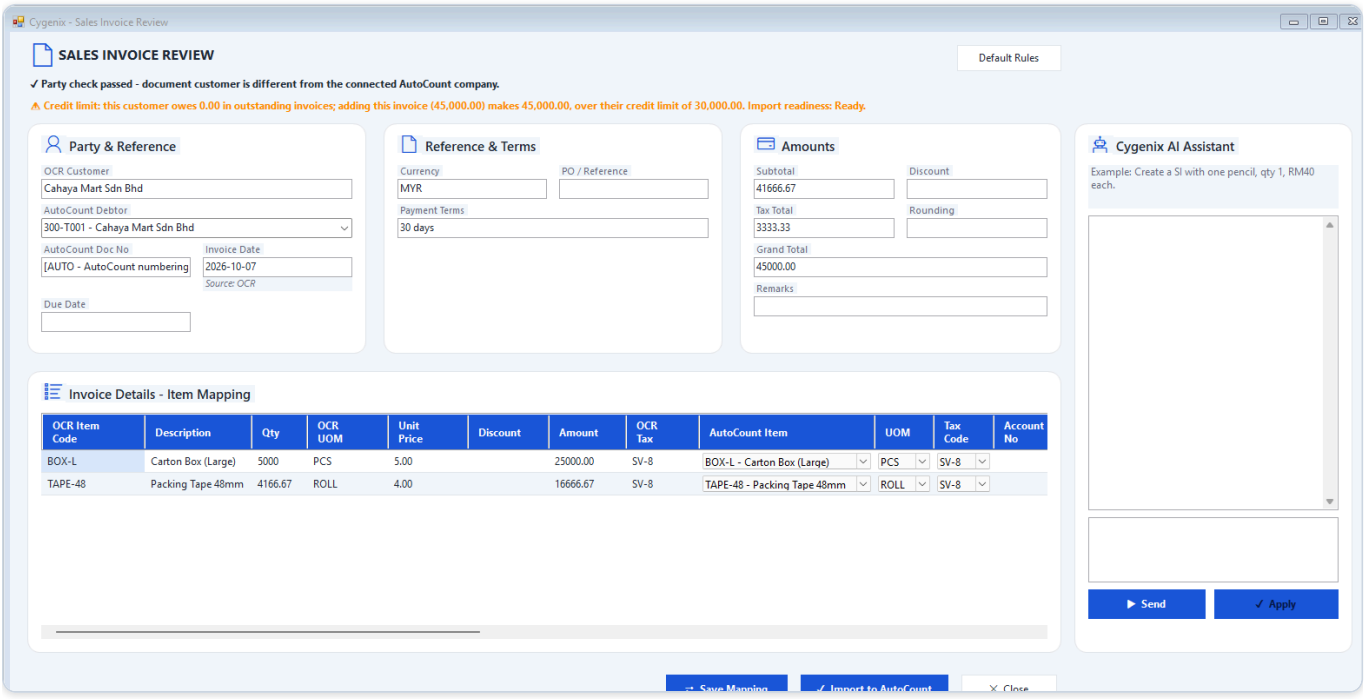
- **AutoCount Creditor / Debtor** — choose the matching supplier or customer from your AutoCount list.
- **Header fields** — invoice number, date, currency, totals. Edit any field that is wrong.
- **Item mapping table** — for each line choose the **AutoCount Item**, **UOM** and **Tax Code**. Use **Save Mapping** so the same item is matched automatically next time.
- **Cygenix AI Assistant** — type an instruction such as “change the quantity of line 2 to 5” and click **Send**, then **Apply** to use the suggestion.

Warnings that help you avoid mistakes

Under the title ScanLink shows the import status. It never blocks you for these — you decide — but they are worth reading:

Warning	Where	What it means
Possible duplicate	Purchase and Sales Invoice	AutoCount already has an invoice with the same supplier invoice number, or the same customer, total and date.
Purchase Order mismatch	Purchase Invoice	The quantities or items do not agree with the matching Purchase Order.
Price change	Purchase Invoice	An item’s price differs from what you paid last time.

Self-billed e-Invoice	Purchase Invoice	The supplier has no business registration number on file — you may need a self-billed e-Invoice.
Credit limit / overdue limit	Sales Invoice	This invoice would take the customer past their AutoCount credit limit, or they are already over their overdue limit. If AutoCount is set not to allow exceeding it, the invoice may be refused.
Customer flagged in AutoCount	Sales Invoice	The customer has a block or warning for invoices set in AutoCount; its message is shown.



Sales Invoice review: this invoice would take the customer over their AutoCount credit limit (orange warning).

Import

When the status line says **Import readiness: Ready**, click **Import to AutoCount**. The document is posted and the AutoCount document number is shown on the screen and in the list. You can click **Save Mapping** first if you only want to save your matching.

> **Sales Invoices and Sales Credit Notes** use **AutoCount's own access rights**: if your AutoCount user is not allowed to approve them, ScanLink does not let you import them either.

8. Approvals, auto-import and the scan folder

Approve now, import later

A reviewer (on the PC or on the phone) can **approve** a document. Approved documents wait until they are imported — either by clicking **Import Approved Now**, or automatically if you switch on auto-import.

Automatic import

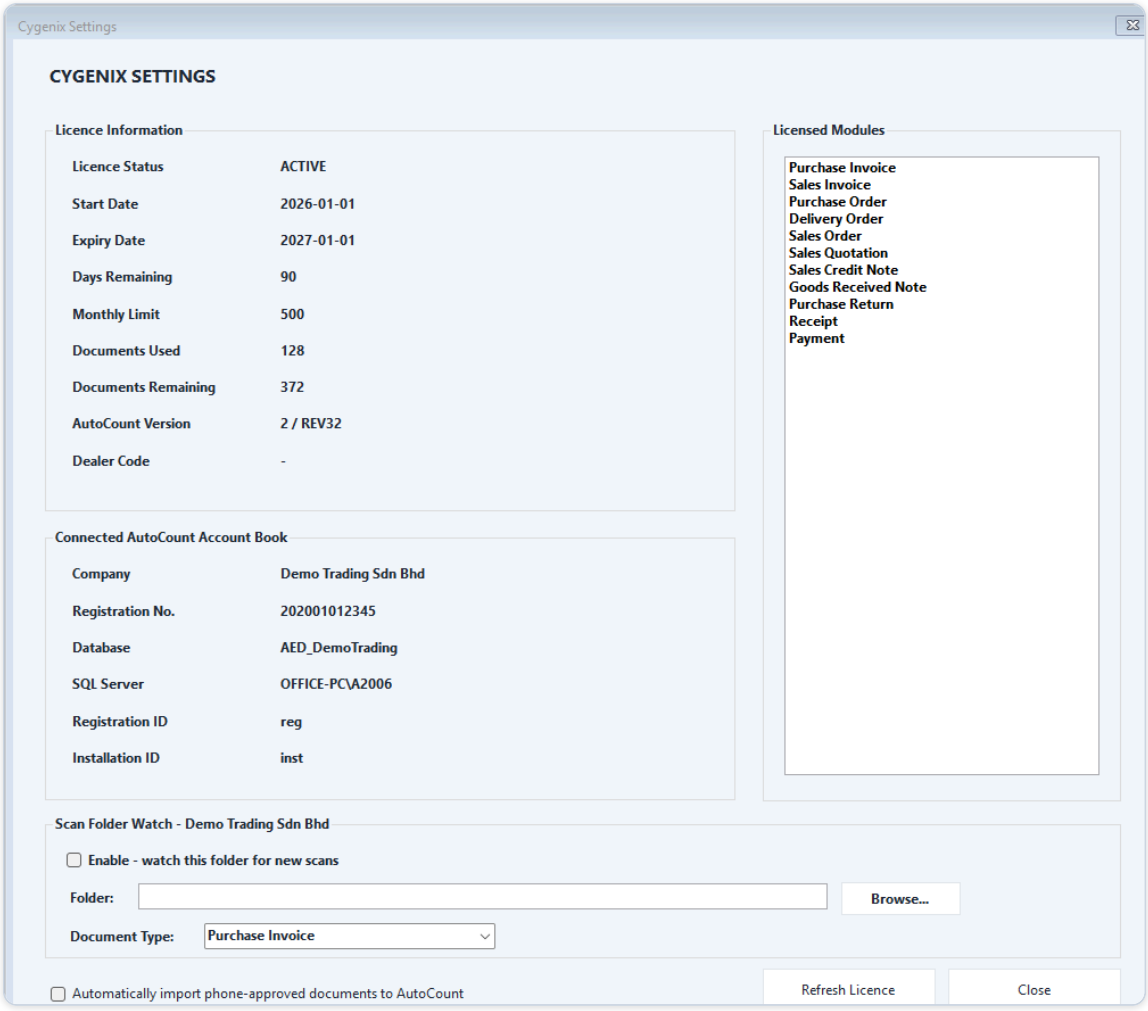
In **Settings** tick **Automatically import phone-approved documents to AutoCount**. While the Documents workspace is open, ScanLink checks every few minutes and imports approved documents. It only imports a document when every

check passes (supplier or customer, items, dates, access rights). Anything that fails is left for you to fix — nothing is forced through. The **Auto-Import Log** shows what happened.

> **Switch this on only when you are comfortable:** auto-import posts into AutoCount without anyone watching at that moment.

Scan Folder Watch

If your office scanner can "scan to folder", let ScanLink watch that folder: in **Settings** tick **Enable – watch this folder for new scans**, choose the **Folder** and the **Document Type**. New files are sent automatically, then moved into a `Processed` sub-folder (or `Errors` if something failed). Each company has its own scan folder.



Settings: licence information, licensed modules, Scan Folder Watch and automatic import.

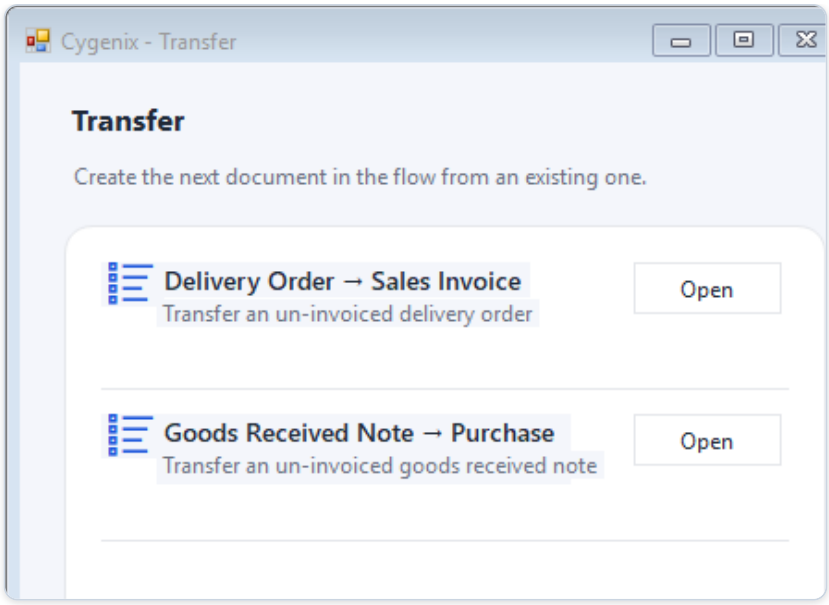
9. Transfer, Reports and Usage

Transfer

Create the next document in the chain from one you already have in AutoCount:

- **Delivery Order → Sales Invoice**
- **Goods Received Note → Purchase Invoice**

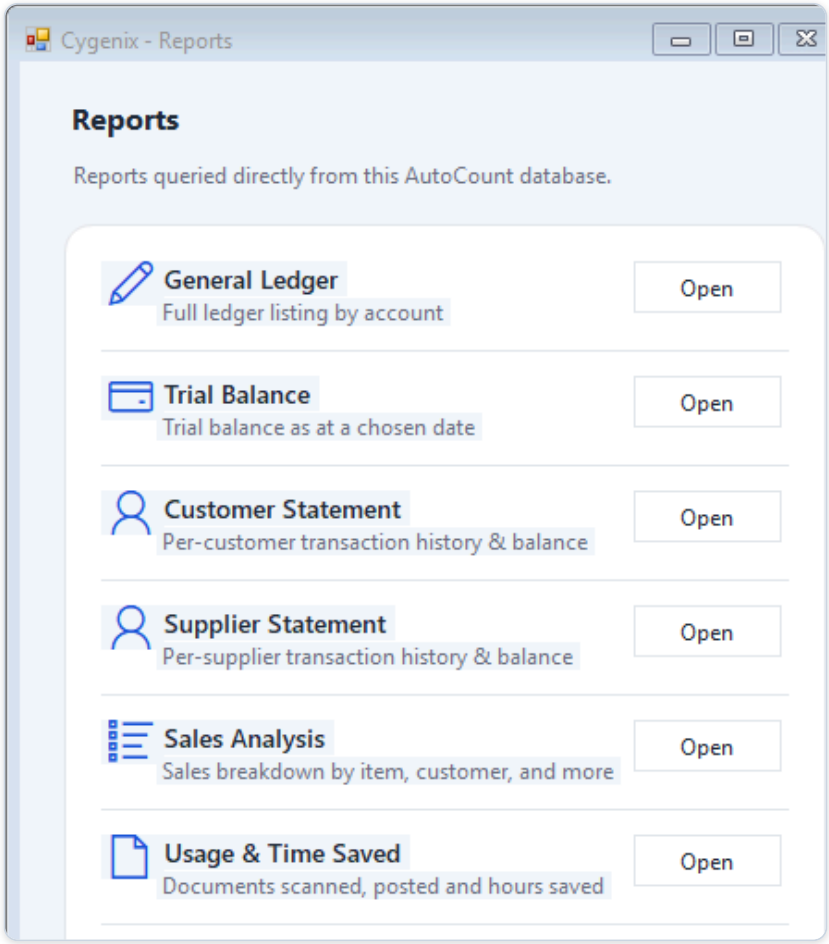
Click **Transfer** in the workspace, choose the flow and pick the document.



The Transfer screen.

Reports

Click **Reports** for reports read straight from your AutoCount database. Reports you open on the PC are also copied to the Phone App so you can look at them on the go (as they were when last opened).



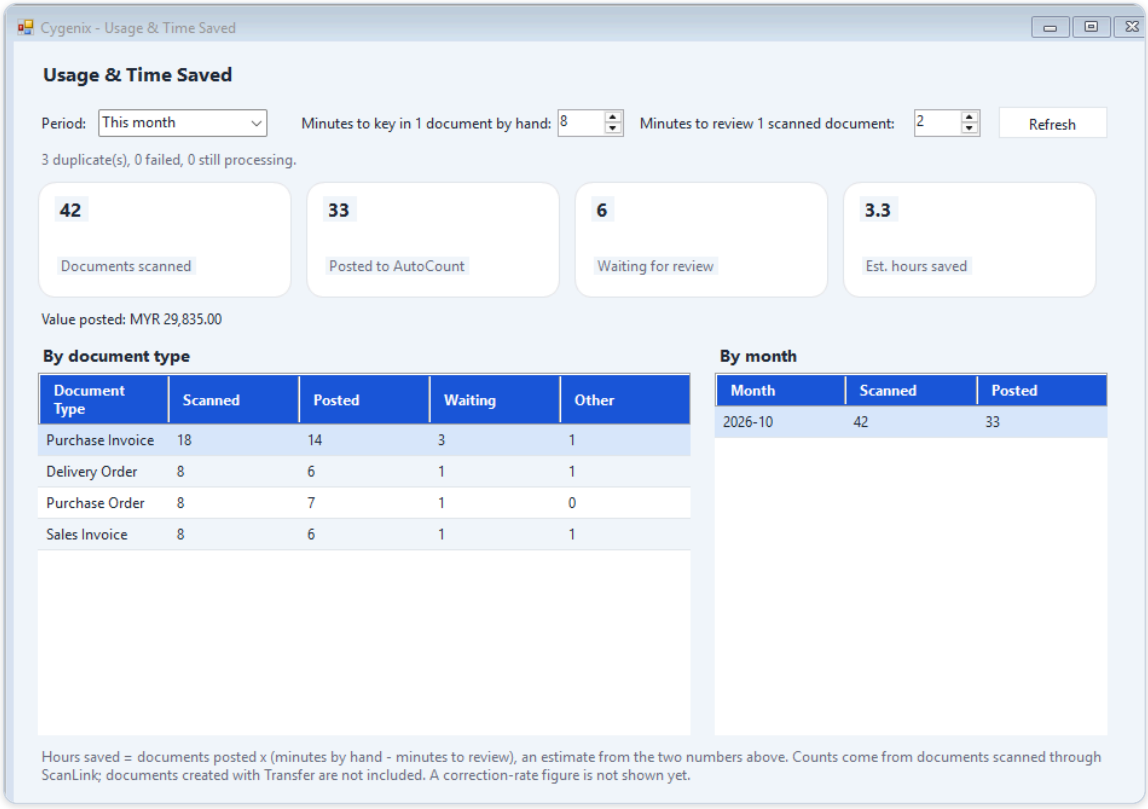
The Reports menu.

- **General Ledger** and **Trial Balance**
- **Customer Statement** and **Supplier Statement**

- **Sales Analysis**
- **Usage & Time Saved**

Usage & Time Saved

See how many documents you scanned, how many were posted, how many are waiting, and an **estimate** of the hours saved.



Usage & Time Saved (sample figures).

Hours saved = documents posted × (minutes to key in by hand − minutes to review). You can change the two minute values to match your own office. Documents created with Transfer are not counted.

10. Several companies

If you look after more than one AutoCount company (for example an accounting firm with many clients), ScanLink remembers each one.

- After a successful connection click **Remember Info** — the company is added to **Saved Companies**.
- Next time pick the company in the **Saved Companies** list and click **Connect & Open**. ScanLink connects, checks the licence and opens that company's workspace.
- Use **Remove** to forget a saved login on this PC (nothing in AutoCount changes).
- Each company has its **own scan folder** and its own phone pairing.

> Each company must be registered with Cygenix, and your licence sets how many companies (databases) you can use.

11. The Phone App

The Phone App is a web page that opens in your phone's browser. There is nothing to download from an app store.

Connecting a phone

1. On the PC, in the Documents workspace, click **Pair Phone**. A QR code appears (valid for 10 minutes, one use).
2. Open the phone's camera and scan the QR code. If it opens inside a small scanner preview, tap the menu and choose **Open in Safari** (or your browser) first.
3. Tap **Complete Pairing**. Your company name appears at the top. Done — the phone stays paired until you tap **Unpair this phone**.



The Pair Phone window on the PC (sample QR code).

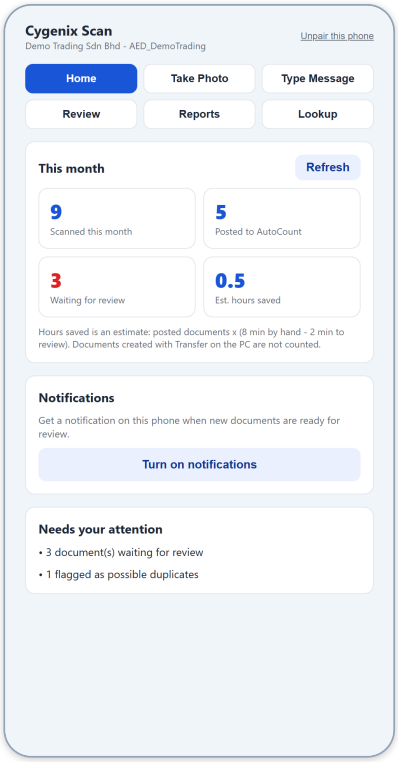
> **Phone limit:** your licence sets how many phones can be connected. **Out of date?** If the phone says the pairing is out of date (for example after AutoCount was updated), tap **Unpair and re-pair** and scan a new code.

What the Phone App offers

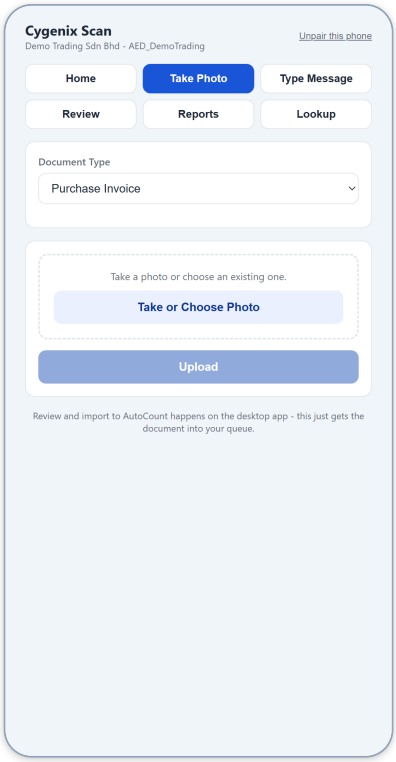
The newer features below need **Connector 1.0.13 or later** on the PC the phone is paired to. A phone paired to an older Connector keeps the original four tabs.

Tab	What you can do
Home *(new)*	This month's documents scanned, posted and waiting, an estimate of hours saved, and a "Needs your attention" list. Turn notifications on or off here.

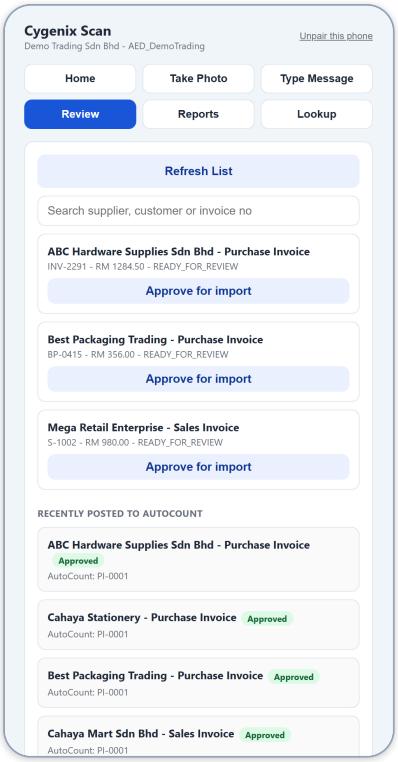
Take Photo	Choose the document type, take a photo (or pick one) and tap **Upload**. **Add another page** *(new)* combines several photos into one document.
Type Message	Describe a document in words to create a draft.
Review	See documents waiting for you, search them *(new)*, open one to correct it, **View original document** *(new)*, then **Save & Approve for Import**. **Approve for import** *(new)* approves straight from the list.
Reports	The reports you opened on the PC (as of when last opened).
Lookup *(new)*	Search your customers, suppliers and items by code or name.



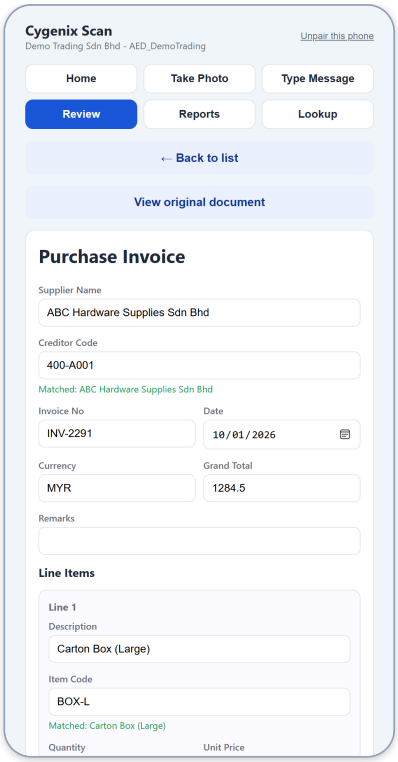
Home



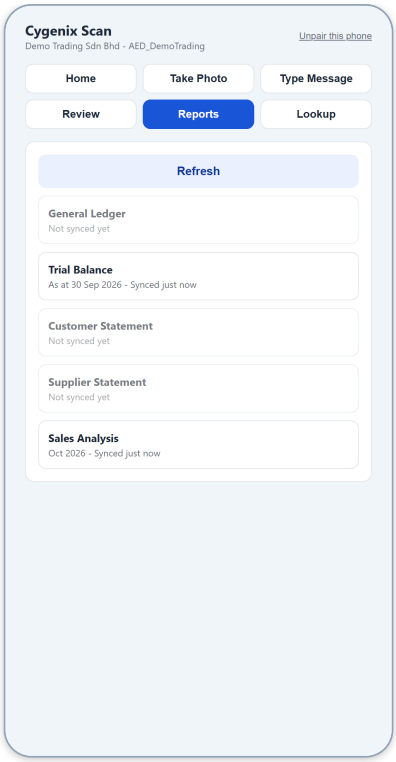
Take Photo



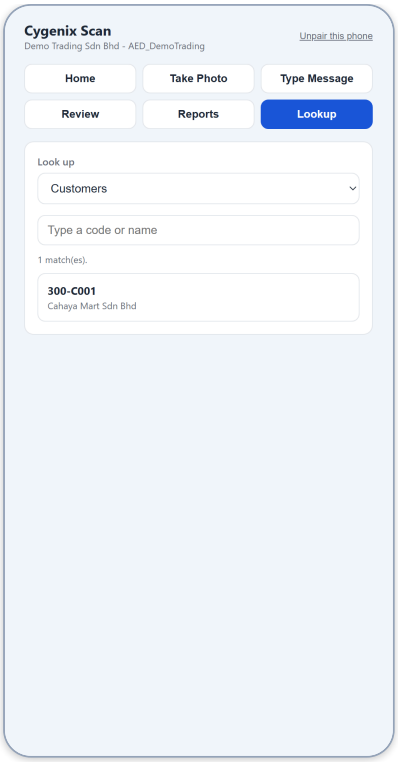
Review list



Reviewing a document



Reports



Lookup

Reviewing on the phone

- Open a document from **Review**. Each code you type shows Matched when it exists in AutoCount, or a warning when it does not.
- Edit anything that is wrong, then **Save & Approve for Import**. The PC imports it into AutoCount (automatically if auto-import is on, otherwise when someone clicks **Import Approved Now**).
- **Approve for import** on the list approves a document exactly as the AI read it. It only works when the supplier or customer, every item and the total are already matched in AutoCount; otherwise the full review screen opens so you can fix it first.

Notifications

On **Home**, tap **Turn on notifications** and allow them. You will get a notification when new documents are ready for review.

> **iPhone:** notifications work only when the page is added to the Home Screen. Tap Share → **Add to Home Screen**, open **Cygenix Scan** from the Home Screen, and pair it by typing the **code shown under the QR** in the Pair Phone window (the Home Screen app keeps its own storage, so it cannot be paired by scanning). Then turn notifications on.

12. Settings and your licence

Click **Settings** in the workspace to see:

- **Licence Information** — status, start and expiry dates, days remaining, monthly document limit, documents used and remaining, and your AutoCount version.
- **Licensed Modules** — the document types included in your licence.

- **Connected AutoCount Account Book** — the company you are working in.
- **Scan Folder Watch** and **Automatic import** (chapter 8).
- **Refresh Licence** — reloads your licence details from the server.

When you reach your monthly document limit, uploads are paused until the next month or until your dealer raises the limit.

13. Questions and troubleshooting

Problem	What to try
Cannot connect to AutoCount	Check the SQL server name, SQL user and password, and that the SQL Server service is running. Then re-enter the AutoCount user and password and test again.
Licence Status is not ACTIVE	Click **Check Licence**. If it says not registered, click **Register Database**. If it is expired or suspended, contact your dealer.
The QR code on the phone expired	Codes last 10 minutes and work once. Click **Generate New Code** on the PC and scan again.
Phone says “pairing is out of date”	Tap **Unpair and re-pair**, then pair again from the PC.
Phone limit reached	Your licence allows a fixed number of phones. Ask your dealer to reset a phone or add more.
New phone tabs (Home, Lookup, …) are missing	They need Connector 1.0.13 or later. Update the PC, open the Documents workspace once, then reload the phone page.
No notifications on iPhone	Add the page to the Home Screen and use that icon (see chapter 11).
Split PDF or QR reading from PDF does nothing	These use the PDF engine in Windows 10/11. Password-protected PDFs cannot be read; remove the password first.
A document shows DUPLICATE	ScanLink thinks it was processed before. Check the list; if it is genuinely different, process it again.
An item or supplier is “not found in AutoCount”	Create it in AutoCount (or choose the right one in the review screen) and try again.
Import fails or is refused	Read the message on screen. Common causes: your AutoCount user lacks the access right, the customer is over their credit limit and AutoCount does not allow it, or a required field is empty.

Need help? Contact your Cygenix Solutions dealer and tell them the version number (shown in the installer folder name) and what you saw on screen.

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