



PIA for Sage X3 – Site Code Identifier

PIA is V1's OCR solution to capture sufficient information from an inbound Invoice or Credit note (whether from a scan, an on disk PDF or inbound email attachment) in order to create it in Sage X3.

One of the **mandatory** pieces of information to create a document is the Site code, along with the supplier details, dates and values.

PIA presents you with a **dropdown** of all site code's available from Sage X3 from which to pick.

To **avoid the need** to keep selecting the same one time and again, and given a Site code is very unlikely to be information that can be extracted from an Invoice, the Site Code Identifier is used.

This could be an email address, post code, **any piece of text** that is consistent for the Site so it can be identified.

How does it work?

When a Site Code Identifier value is extracted for the first document that is received, it is committed to a special **EDM table called DbCapture Site Code Identifiers**.

The Site Code and template ID of the document associated with the value is stored.

When subsequent invoices arrive and the value is found, the Site Code is then retrieved and **automatically populated** without the need to pick from a dropdown.

Can I change it?

Yes. If you have extracted a Site Code Identifier but want to change it, enter a . in the field and click check. The previous selection is cleared from the DbCapture Site Code Identifier EDM table allowing you to re-identify a new value.

Do I have to use it?

You have 3 options.

1. It can be turned off completely, this means every NONPOP or BIS document will need to have its Site manually added each time by picking it from the dropdown.
2. It can be made optional, a warning is generated, you don't have to use it but are advised to and if used, it will be preserved.
3. It can be made mandatory, an error is generated if not used and the document cannot be processed until populated.

A simple implementation option decides on which one best suits the customer requirements.

Example

Invoice arrives from Mitsu Manufacturing in PIA and is new to the system.
Their implementation means it is mandatory to have a Site Code Identifier.

They have 3 Sites, 1 in London, 1 in Paris and 1 in Germany.

The Invoice is from London, the users extracts the Post Code as the Site Code Identifier and the Site Code is selected from the dropdown. The documented is exported and created in Sage X3.

A week later, another invoice arrives from Mitsu Manufacturing in PIA, as it has a Site Code Identifier, the Site Code is automatically selected **without the need for any user intervention**.

