



## Sales Order Automation with EDM for Sage X3 by V1

### What is it used for?

SOA for Sage X3 by V1 Release 12.1 provides the following functionality:

- Sales Orders (GESSOH)
  - Create a Sales Order in Sage X3 by matching against singular or multiple Sales Quotes
  - Create a Sales Order in Sage X3 by retrieving the previous order from the customer
  - Create a Sales Order in Sage X3 by building the grid faster than the Sage X3 interface

### How do I use it?

There are 2 clients when using the SOA system, this system is termed DbCapture:

- DbCapture Admin
  - This gives an overview of all documents in the queue being processed
- DbCapture Interactive Client
  - Allows your Orders to be tagged for data and matching the information seamlessly against the Sage X3 database

### How do I get my Orders into DbCapture?

There are 3 principal ways to get your Orders into the DbCapture system for processing:

- Scan in your incoming paper Orders
  - When you receive your Order in the post from your Customer, simply scan it in using a MFD or dedicated scanner
- Import your PDF copies
  - Receive an email from a Customer with a PDF Invoice attached? Drag and drop it in to a pre-determined directory, DbCapture automatically imports it in to the right profile, by site and transaction type
- By checking a specially setup email address and importing
  - New for Release 12.1, tell your customers to send orders as PDF attachments to a specific email address, when received the attachment is *automatically* extracted and imported to the DbCapture profile configured

As soon as a Sage X3 Folder / Endpoint is patched to use SOA, the PDF import directories are automatically created for all the sites and all customers, meaning implementation time is kept to a minimum.

### What else is new for Release 12.1?

Thanks to the feedback from customers and partners, Release 12.1 also includes as standard:

- Automatically purge your legacy exported documents at a frequency of your choosing
- Have individual services to choose which DbCapture profile import PDF's
- Automatically export fully validated Orders at a period of your choosing, meaning an emailed PDF could be automatically matched and created in Sage X3 within minutes with minimal to no user intervention.

