



V1 Document Management

EDM for Sage X3 by V1

Electronic Document Management

PIA for Sage X3 by V1

Purchase Invoice Automation

SOA for Sage X3 by V1

Sales Order Automation

Release 12.1

Quick Start Client Installation Guide

Updated - 16 March 2017

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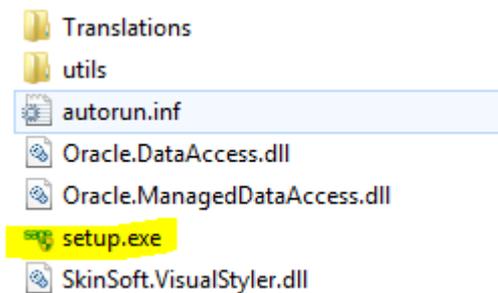
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1. Introduction

This is a quick start guide for installing the client programs necessary for day to day usage of the EDM / PIA / SOA for Sage X3 by V1 Release 12.1 solution.

Assumptions:

- ▶ The Server installation has been fully completed
- ▶ The Sage X3 Application server is named SAGEPU9APPSERVER
- ▶ The EDM / PIA / SOA for Sage X3 by V1 Release 12.1 distribution is on the Sage X3 Application server and a share of <\\SAGEPU9APPSERVER\R12DISTRIB> which if browsed too shows the installation files:



2. Installation Procedure

1. On the client PC, browse to <\\SAGEPU9APPSERVER\R12DISTRIB> in File Explorer
2. Right click on setup.exe and click Run as administrator
3. When prompted, select your language, click Next >
4. When prompted, select Client installation, click Next >
5. When prompted, enter the Sage X3 Application Server. In our example this is SAGEPU9APPSERVER and click Check

This triggers a process to query the Sage X3 application server for the clients you are licensed for

6. Confirm the desired location of the clients
7. Tick the boxes next to the clients you wish to install
8. Click Install
9. When completed, close the setup program

Consult the crib sheets on how to use the software or press F1 at any time which logged in to a client to view the help guides.

NOTE: The help guides are only in English.

3. DbScanner Configuration

Assumptions:

- ▶ The Client installation procedure has been fully completed
- ▶ The Desktop shortcuts have been created

DbScanner is the only client which requires further configuration beyond the installation as it is tailored to the individual user's day to day requirements.

Follow these step by step actions.

The first time DbScanner is loaded, it attempts to create an acquisition component to allow the importing of files.

This is done in \Program Files for 32-bit clients or \Program Files (x86) for 64-bit clients, as such needs administrative privileges.

1. On your desktop, **right click and run as administrator** (you will only need to do this *the first time* you open DbScanner) from the DbScanner shortcut
2. When prompted, login as per your DbLogin Admin Console credentials as created by the system administrator
3. You will see a popup stating 'Scan source has not been configured', this is normal, click OK
4. A Scan Source box appears, it gives you the option to either select a scanner found by the PC, or to have a source to import images. For now, click OK.
5. The Acquisition Sources box should now appear displaying your source, click Close
6. You can now import the Scanner Profiles you wish to use on a day to day basis, whether that's barcode scanning for import in to EDM, or to export Invoices into PIA or Sales Orders in to SOA.

3.1 EDM

In this example, we will use Purchase Invoices, but the principal applies for all document types available.

1. Log in to DbScanner as your configured user
2. Go to Configuration > Configure Scan Profiles > Add/Edit Local Scan Profile
3. Click Import
4. You should see a list of Global Profiles configured out the box, click the EDM – PIH - Purchase Invoice tick box and click OK
5. When asked if you wish to import it, click Yes
6. With Purchase Invoice selected in the Scan Profile Management screen, click Edit
7. Click the Destination Details Tab
8. If you are only using 1 Sage X3 Folder / Endpoint, change the text in the first field to reflect the name of it, if you're using multiple
 - a. Change the Input type to DropDownList
 - b. Click the [...] button in the Default Value cell
 - c. Add all the Sage X3 Folders / Endpoints you wish to scan in to
 - d. Set the most communally used one (if applicable) as default
9. Ensure the Default Value of Document Creator ##USER##
10. Ensure the Default Value of Submission Date ##DATE##
11. Ensure the tick box in the Invoice Number row for Use Document Name is ticked
12. Ensure the tick boxes in the Passed for Server Lookup column are ticked for:
 - a. Sage X3 Folder
 - b. Invoice Number
 - c. Document Creator
13. Click OK

See the EDM screenshot for an example of a finished configuration.

3.2 PIA – PIH - Purchase Invoices

For our example, we will assume the Sage X3 Folder / Endpoint to be configured is **SEED**, change to match the actual name of your installation.

1. Log in to DbScanner as your configured user
2. Go to Configuration > Configure Scan Profiles > Add/Edit Local Scan Profile
3. Click Import
4. You should see a list of Global Profiles configured out the box, click the PIA – PIH Purchase Invoice tick box and click OK
5. When asked if you wish to import it, click Yes
6. With PIA – PIH - Purchase Invoice selected in the Scan Profile Management screen, click Edit
7. Click the Destination Details Tab
8. Select the **SEED** Purchase Invoices / Credits Profile
9. Add the text **SEED** as a Default Value in the Sage X3 Folder / Endpoint cell
10. For the Process cell
 - a. Change the Input type to DropDownList
 - b. Click the [...] button in the Default Value cell
 - c. Add values POP and DIRECT and select POP as the default value
11. For the Transaction Type cell
 - a. Change the Input type to DropDownList
 - b. Click the [...] button in the Default Value cell
 - c. Add values INVOICE and CREDIT and select INVOICE as the default value
12. Accounting Date
 - a. Set the Default Value to **##DATE##**
13. Scan User
 - a. Set the Default Value to **##USER##**
14. Scan Date
 - a. Set the Default Value to **##DATE##**
15. Scan Batch
 - a. Set the Default Value to **##BATCHNAME##**
16. Tick Hide for all rows except:
 - a. Sage X3 / Folder / Endpoint
 - b. Site Code
 - c. X3 Invoice Type
 - d. Process
 - e. Transaction Type

See the PIA – PIH - Purchase Invoices screenshot for an example of a finished configuration.

3.3 PIA – BIS – Supplier Invoice

For our example, we will assume the Sage X3 Folder / Endpoint to be configured is **SEED**, change to match the actual name of your installation.

1. Go to Configuration > Configure Scan Profiles > Add/Edit Local Scan Profile
2. Click Import
3. You should see a list of Global Profiles configured out the box, click the Purchase Invoice tick box and click OK
4. When asked if you wish to import it, click Yes
5. With Purchase Invoice selected in the Scan Profile Management screen, click Edit
6. Click the Destination Details Tab
7. Select the **SEED** AP / AR Purchase Invoices / Credits
8. Add the text **SEED** as a Default Value in the Sage X3 Folder / Endpoint cell
9. Transaction Type
 - a. Change the Input type to DropDownList
 - b. Click the [...] button in the Default Value cell
 - c. Add values INVOICE and CREDIT and select INVOICE as the default value
10. Document Identification
 - a. Change the Input type to DropDownList
 - b. Click the [...] button in the Default Value cell
 - c. Add values INVOICE and CREDIT and select INVOICE as the default value
11. Accounting Date
 - a. Set the Default Value to ##DATE##
12. Scan User
 - a. Set the Default Value to ##USER##
13. Scan Date
 - a. Set the Default Value to ##DATE##
14. Scan Batch
 - a. Set the Default Value to ##BATCHNAME##
15. Tick Hide for all rows except:
 - a. Sage X3 / Folder / Endpoint
 - b. Transaction Type

See the PIA – BIS – AP / AR Purchase Invoices / Credits screenshot for an example of a finished configuration.

3.4 PIA – DIRECT Invoice

For our example, we will assume the Sage X3 Folder / Endpoint to be configured is **SEED**, change to match the actual name of your installation.

1. Log in to DbScanner as your configured user
2. Go to Configuration > Configure Scan Profiles > Add/Edit Local Scan Profile
3. Click Import
4. You should see a list of Global Profiles configured out the box, click the Direct Invoice - PIA tick box and click OK
5. When asked if you wish to import it, click Yes
6. With Direct Invoice – PIA selected in the Scan Profile Management screen, click Edit
7. Click the Destination Details Tab
8. Select the **SEED** Direct Coded Purchase Invoice Profile
9. Add the text **SEED** as a Default Value in the Sage X3 Folder / Endpoint cell
10. Transaction Type
 - a. Change the Input type to DropDownList
 - b. Click the [...] button in the Default Value cell
 - c. Add values INVOICE and CREDIT and select INVOICE as the default value
11. Accounting Date
 - a. Set the Default Value to **##DATE##**
12. Scan User
 - a. Set the Default Value to **##USER##**
13. Scan Date
 - a. Set the Default Value to **##DATE##**
14. Scan Batch
 - a. Set the Default Value to **##BATCHNAME##**
15. Tick Hide for all rows except:
 - a. Sage X3 / Folder / Endpoint
 - b. Site Code
 - c. X3 Invoice Type
 - d. Process
 - e. Transaction Type

See the PIA – DIRECT Invoices screenshot for an example of a finished configuration.

3.5 SOA

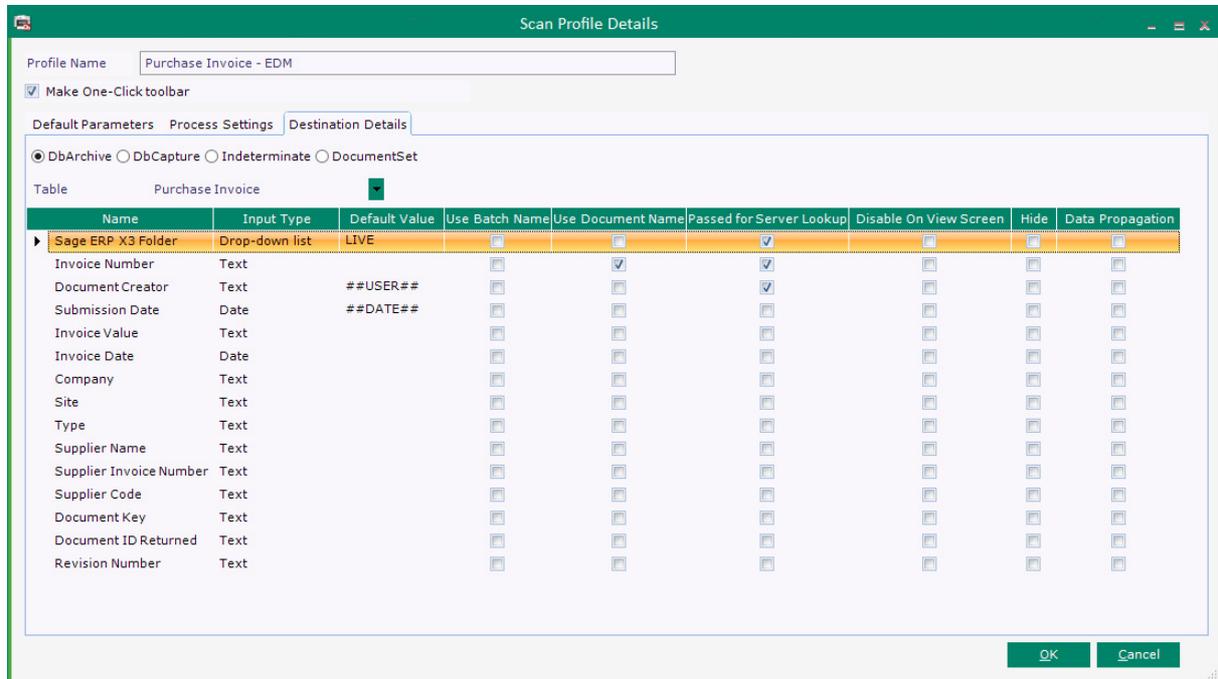
For our example, we will assume the Sage X3 Folder / Endpoint to be configured is **SEED**, change to match the actual name of your installation.

1. Go to Configuration > Configure Scan Profiles > Add/Edit Local Scan Profile
2. Click Import
3. You should see a list of Global Profiles configured out the box, click the SOA – SOH Sales Orders, tick box and click OK
4. When asked if you wish to import it, click Yes
5. With SOA – SOH - Sales Orders selected in the Scan Profile Management screen, click Edit
6. Click the Destination Details Tab
7. From the Profile drop down, select **SEED** Sales Orders
8. Add the text **SEED** in the Sage X3 Folder / Endpoint cell
9. In the Grid Source cell:
 - a. Change the Input type to DropDownList
 - b. Click the [...] button in the Default Value cell
 - c. Add the following as options
 - i. Last Order for Customer
 - ii. Quote Number
 - iii. Manually add Grid Content
10. User
 - a. Set the Default Value to **##USER##**
11. Date
 - a. Set the Default Value to **##DATE##**
12. Tick Hide for all rows except:
 - a. Sage X3 Folder / Endpoint
 - b. Grid Source

See the SOA screenshot for an example of a finished configuration.

4. Example Screen Shots

4.1 EDM



4.2 PIA – PIH - Purchase Invoices

Scan Profile Details

Profile Name:

Make One-Click toolbar

Default Parameters Process Settings Destination Details

DbArchive DbCapture Indeterminate DocumentSet

Profile: SEED Purchase Invoices / Credits

| Name | Input Type | Default Value | Use Batch Name | Use Document Name | Disable On View Screen | Hide | Data Propagation |
|-----------------------------|----------------|---------------|--------------------------|--------------------------|--------------------------|-------------------------------------|--------------------------|
| ▶ Sage X3 Folder / Endpoint | Text | SEED | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Query Database | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Supplier Code | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Supplier Name | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Supplier Currency | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Site Code | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| X3 Invoice Type | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Process | Drop-down list | POP | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| DocumentIdentification | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Transaction Type | Drop-down list | INVOICE | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Supplier DocumentReference | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Supplier Document Date | Date | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Accounting Date | Date | ##DATE## | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Purchase Order Number(s) | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Purchase ReceiptNumber(s) | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Packing Slip Number(s) | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Net Value | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Transport Charge | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Insurance Charge | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Customs Charge | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Discount | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Invoice Tax Amount | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Gross Value | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Document Currency Code | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Scan User | Text | ##USER## | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Scan Date | Date | ##DATE## | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Scan Batch | Text | ##BATCHNAME | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

OK Cancel

4.3 AP / AR Purchase Invoices / Credits

Scan Profile Details

Profile Name:

Make One-Clicktoolbar

Default Parameters Process Settings Destination Details

DbArchive DbCapture Indeterminate DocumentSet

Profile: SEED AP / AR Purchase Invoices / ▼

| Name | Input Type | Default Value | Use Batch Name | Use Document Name | Disable On View Screen | Hide | Data Propagation |
|-----------------------------|------------|---------------|--------------------------|--------------------------|--------------------------|-------------------------------------|--------------------------|
| ▶ Sage X3 Folder / Endpoint | Text | SEED | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Query Database | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Supplier Code | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Supplier Name | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Supplier Currency | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Site Code | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| X3 Invoice Type | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Collective | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Document Identification | Text | INVOICE | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Transaction Type | Text | INVOICE | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Supplier Document Reference | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Supplier Document Date | Date | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Accounting Date | Date | ##DATE## | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Net Value | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Invoice Tax Amount | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Gross Value | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Pay Approval | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Comment | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Number Of Lines | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Scan User | Text | ##USER## | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Scan Date | Date | ##DATE## | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Scan Batch | Text | ##BATCHNAME## | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

OK Cancel

4.4 PIA – DIRECT Invoice

Scan Profile Details

Profile Name: Direct Invoice - PIA

Make One-Click toolbar

Default Parameters Process Settings Destination Details

DbArchive DbCapture Indeterminate DocumentSet

Profile: SEED Direct Coded Purchase Invoi

| Name | Input Type | Default Value | Use Batch Name | Use Document Name | Disable On View Screen | Hide | Data Propagation |
|-----------------------------|----------------|---------------|--------------------------|--------------------------|--------------------------|-------------------------------------|--------------------------|
| ▶ Sage X3 Folder / Endpoint | Text | SEED | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Query Database | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Supplier Code | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Supplier Name | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Supplier Currency | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Site Code | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| X3 Invoice Type | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Document Identification | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Transaction Type | Drop-down list | INVOICE | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Supplier Document Reference | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Supplier Document Date | Date | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Accounting Date | Date | ##DATE## | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Net Value | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Transport Charge | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Insurance Charge | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Customs Charge | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Discount | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Invoice Tax Amount | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Gross Value | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Pay Approval | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Number Of Lines | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Scan User | Text | ##USER## | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Scan Date | Date | ##DATE## | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Scan Batch | Text | ##BATCHNAME | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

OK Cancel

4.5 SOA

Scan Profile Details

Profile Name:

Make One-Click toolbar

Default Parameters Process Settings Destination Details

DbArchive DbCapture Indeterminate DocumentSet

Profile: SEED Sales Orders

| Name | Input Type | Default Value | Use Batch Name | Use Document Name | Disable On View Screen | Hide | Data Propagation |
|-----------------------------|----------------|-------------------------|--------------------------|--------------------------|--------------------------|-------------------------------------|--------------------------|
| ▶ Sage X3 Folder / Endpoint | Text | SEED | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Query Data | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Customer Code | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Customer Name | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Customer Currency | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Sales Site | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Sales Type | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Customer Order Reference | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Order Date | Date | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Shipping Site | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Payment Terms | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Tax Rule | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Sales Representative | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Grid Source | Drop-down list | Last Order for Customer | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Grid Source Number | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Number Of Lines | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Order Total | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| User | Text | ##USER## | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Date | Date | ##DATE## | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Send Acknowledgement | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Acknowledgement Email | Text | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

OK Cancel