



Certified Solution  
**Sage X3**



**V1**  
Document  
Management

## PIA FOR SAGE X3 BY V1 PURCHASE INVOICE AUTOMATION

Use intelligent Optical Character Recognition (OCR) technology to capture data from vendor invoices and automate filing in EDM for Sage X3 by V1

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EDI and XML invoicing are still not viable for many vendors. Most businesses continue to receive a substantial number of paper invoices. The PIA solution for Sage X3 seeks to improve the efficiency of the Accounts Payable function by automating the processing of paper and PDF invoices.

Incoming paper invoices and credit notes are scanned on receipt using the EDM for Sage X3 solution. The documents are processed using smart OCR technology to identify the sender and match to a vendor in the Sage X3 database. Invoice layouts are learned on-the-fly and remembered for even more automated processing in the future. Invoices relating to purchase orders are matched to goods receipts to speed up the allocation process in Sage X3.

Data extracted from invoices and credit notes is validated against the Sage X3 database and analyzed for consistency. The operator can check and correct all data before transactions are posted into Sage X3. Once an invoice is accepted, Sage X3 is updated via a web service and the document image is automatically filed in the EDM solution.

Where vendors submit their invoices in PDF format there is no need to print and scan the documents. PDFs can be automatically picked up from a shared folder and processed in an identical fashion to scanned paper invoices.

The PIA for Sage X3 by V1 solution is based on the EDM solution which is a prerequisite. The EDM solution stores all documents securely in the database and links them to the relevant transaction and business partner. Suppliers' delivery notes, certificates and other supporting documents can be scanned in with the invoices or separately using the standard EDM solution for Sage X3 and scan station.

# How PIA for Sage X3 by V1 addresses the challenges.

## ► Productivity

- Use industry-leading OCR technology to save time on data entry
- Facilitate centralized AP processing for economies of scale
- Capture invoices and credit notes earlier

## ► Cost Savings

- Scan invoices on receipt and transmit electronically, save on internal postage
- Eliminate photocopying for query resolution, use less stationery
- Handle queries through email
- Accept PDF invoices and avoid printing and scanning
- Archive invoices electronically to avoid physical storage

## ► Compliance

- Automate the archiving of invoices in the PIA for Sage X3 by V1
- Improve auditability with relational database technology for document storage
- Satisfy auditors and tax authorities

## ► Reduce errors

- Reduce the amount of manual keying and potential for human error
- Additional error checking highlights, invalid order numbers
- Recognition of vendor details highlights duplicated vendors in the purchase ledger

**INVOICE**  
INVOICE: 87000047  
DATE: 25/04/2012

TO: V1 DEMO SYSTEM  
1, Green Lane, Oak Park, UK

SHIP TO: V1 DEMO SYSTEM  
1, Green Lane, Oak Park, UK

QUANTITY	DESCRIPTION	UNIT PRICE	TOTAL
7	Castings: Inland	13.00	91.00
11	5 Sprinklers	8.00	88.00

Sub Total: 179.00  
Tax: 17.90  
Total: 196.90  
VAT REC NO: 741 852 979  
Vat Excluded at: 0%

**Summary:**  
Net Value: 185.64  
Additional Charge: 0.00  
Discount: 0.00  
Invoice Tax Amount: 17.17  
Gross Value: 223.01  
Supplier Default Currency: GBP

**25/04/2012**

Includes	Source	Number	Product Code	Product Description	Quantity to Invoice	Unit Amount
YES	ORDER	7811402PQH0002	85M0003300	Castings: Inland - Tiger Bars	7	13.00
YES	ORDER	7811402PQH0002	85M0003300	Pump	3	8.00
YES	ORDER	7811402PQH0002	85M0003300	5 Sprinklers	11	8.00



Get in touch about how V1 can benefit your business:

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