

# HOW TO: SETUP RBOP IN THE PORTAL



- Follow these steps to setup RBOP in the Conexiom portal.
- You will need to setup your company's email server rules **AFTER** completing these steps to finish RBOP configuration.

## Step 1: Buyer Identifier

- Within the Buyer List of the customer/vendor profile in the portal, add the domain for the customer/vendor email address that currently sends documents to you, in the format “@domain.com”.
  - For example, if ABC Company is your customer and their email domain is “@abccompany.com”, then that is the domain that should be used.
- To be eligible for RBOP, the buyer identifier for the trading partner must be unique to that trading partner and not associated with any other trading partner in the portal.

| ACTIONS | LAST NAME ↑ | FIRST NAME | EMAIL                | BUYER IDENTIFIER |
|---------|-------------|------------|----------------------|------------------|
|         | RBOP        | RBOP       | noreply@conexiom.com | @domain.com      |

## Step 2: File Type

- In the “Details” section of the trading partner, “RBOP Setup” indicates whether your Conexiom portal has been enabled to use RBOP. **It does not indicate that any configuration for this trading partner has been completed for the RBOP setup.**
- Click the pencil icon next to “Yes” A pop-up window will appear
- Next, enter the document type that this customer or vendor is mapped against. For example, PDF, XLS, DOC, etc.

File Type Match  ? File Type Ignore

- This field is **not** case sensitive
- It is recommended that if the file extension is “XLSX” or “DOCX”, do not include the “X”



## Step 3: Content Type

- Next, set three words that are always present on the trading partner's documents to indicate that it is the kind of document you want Conexiom to process.
  - For example, if the map is expecting a purchase order, the match terms to determine if the document is a purchase order could be “PURCHASE” AND “ORDER” AND “SHIP”.
- Click the highlighted icon (1) to have Conexiom auto-suggest terms that would work for this TP's documents.
- Typically, a list of many terms will be auto-suggested. Delete all the terms after the first three to avoid creating a filter that is too specific.

Content Match  1

## Step 4: Test

- Once your File Type and Content Match fields are filled in, click “Test Results” to run a regression test against the documents for that trading partner.
- If a red X appears, open the hyperlinked document to see if your file type is a match, and if your content terms are all present.
- If it passes, green check marks will appear for all listed documents under both File Type Match and Content Match. You can then click **Save** and your RBOP configuration in the Conexiom portal will be complete.

| File Type Match | Content Match |
|-----------------|---------------|
| ✓               | ✓             |
| ✓               | ✓             |

You are now ready to configure the rules in your mail server.

# SUMMARY: RBOP EMAIL SERVER RULES



- This is the final step to setting up a trading partner for RBOP.  
*All Conexiom portal setup items must be completed BEFORE setting this trading partner up for RBOP in your email server.*
- Below is an example of how rules may be set up in Outlook for Office 365. Keep in mind this may differ depending on your email client or your license version.

## Example of Office 365 Rule Setup for RBOP

Conditions Settings

Name \*

Conexiom RBOP PDF

← This is where you would name your rule.

Apply this rule if \*

The sender domain is

← This is where the domains included in this rule are listed, like:

The sender's domain is 'abccompany.com'

'domain1.com' or 'domain2.com' or 'domain3.com'

And

Any attachment file extension includes the...

← Here, the file type of the inbound documents are identified (i.e. PDF, XLS, etc.).  
Choose one file type per mail server rule.

Any attachment's file extension matches 'pdf'

Do the following \*

Prepend the subject of the message with 'specifield prefix'

← This is what you choose to prepend subject lines with to indicate to the original recipient that the email has been bcc'd to Conexiom. Short and subtle is best, i.e. "[CX]".

Prepend the subject of the message with '[CX]'

And

Add recipients to the Bcc box

← This will be the RBOP email address that Conexiom provides to you. This is different than the email address that you would use to manually submit documents to Conexiom, and it will have '.cc' in it.

Blind carbon copy (bcc) the message to YourConexiomRBOPEmailAddress.com

## Considerations for Email Server Rules

Server rules should be set up by a member of your IT team and **ARE NOT** created at a user account level. The rules and actions to be configured on the email server include the following:

- ✓ The domain from which the email has been sent
- ✓ The requirement of an attachment in the email
- ✓ The requirement of a specific file type. (i.e., PDF, XLS, etc.)
- ✓ The action to blind copy (bcc) the email to your Conexiom RBOP email address when the above rules are satisfied
- ✓ The action to prepend the subject line of emails that are bcc'd to Conexiom with an indicator of your choice
  - **Note:** Prepending an RBOP email's subject line is important because it will indicate to the user that the email they have received has already been copied (bcc'd) to Conexiom. Be sure to communicate this to your team before activating RBOP for a trading partner to prevent additional submissions to Conexiom.

Your mail server rules can be set up to have multiple domains accounted for within one rule. Separate rules are required for each file type: one rule for all your PDF trading partners; one rule for all your XLS trading partners, etc.