

HOW TO: SET A GOOD ASSIGN KEY



- An assign key ensures that inbound documents are assigned to the correct profile and should always be set for Production trading partners.

1. Types of Assign Keys

1. Document Assign Key

(recommended, includes regression testing)

- Can be set within the Details section for the customer or vendor
- Conexiom checks inbound documents for a defined word or phrase against all assign keys and routes the document based on a match



2. Email Assign Key

(does not incorporate any regression testing)

- Set during configuration of the trading partner
- Uses a unique element of the inbound email to route the document (i.e., recipient, subject line, body, attachment name)



2. Defining an Assign Key

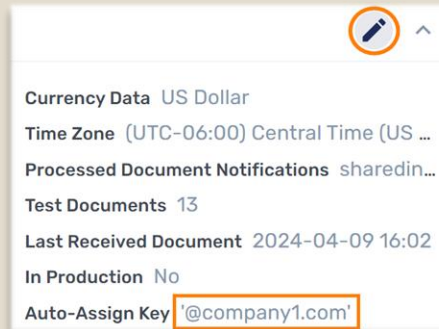
Set at a customer/vendor-level, an assign key can be a single word, phrase, or combination of words that are unique to the trading partner.

- Assign keys are not case-sensitive and both lower- and uppercase are accepted
- If a customer/vendor has 2 or more profiles, assign keys are especially important

If setting a complex assign key that includes separate words and/or phrases, quotations and simple programming operators are required (e.g., AND, OR, NOT) (See below)

3. Setting an Assign Key

1. Click on the **Edit pencil** in the right corner of the Details section to have the option to suggest a document assign key.
2. Conexiom will validate the suggestion against all existing documents in the system and generate a message to the Implementer to confirm whether it was accepted or needs to be revised.
3. To set an email assign key, submit an email change request noting the assign key, with a sample email as an attachment.



4. Once an assign key is set, you will see this on your Customer or Vendor Details page.

4. Examples

Potential **Document** Assign Key based on document billing address:

- Ex. Company 1
- "Ex. Company 1" AND "101 Ex. Street"
- ("Ex. Company 1" OR "101 Ex. Street") AND "EX, 10001"

Ex. Company 1
101 Ex. Street, EX, 10001
Phone: (123)-444-5678
Website:
www.examplecompany1.com

From: user1@company1.com
To: companyname.us@conexiom.net
Subject: Example Company 1 – Purchase Order #1234
Sent: Fri 2021-07-28 19:34
Attachment: EXAMPLECOMPANY1_PO_1234.pdf

Please find attached PO #1234

Potential **Email** Assign Key based on inbound email:

- "Ex. Company 1 - Purchase Order#"
- "EXAMPLECOMPANY1_PO_"
- "Ex. Company 1" AND ".pdf"

