

# HOW TO: CREATE A NEW CUSTOMER/VENDOR

- After saving a new customer/vendor, Conexiom requires at least 5 sample documents representative of any unique details for that specific profile.



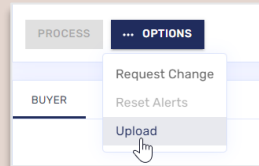
## Providing Sample Orders

- ◆ Clear Text ◆ Consistency ◆ Part Numbers ◆

Samples should adhere to the 3 principles above and include any known variations on how key information is listed.

Please provide an annotated version of one document that highlights the values that Conexiom needs to capture and include comments to indicate what fields/information those values represent.

- Samples can either be sent in as a response to First Pass Mapping emails, sent to your Conexiom Representative via email or shared folder, or uploaded onto the portal from the “Test Documents” tab.
- At the bottom of the Customer/Vendor Details page, you can also add a “Buyer”, though this is only required before moving to production and not during testing.
- To complete the set up send in the initial change request, see the user guide or quick reference card for submitting change requests for more details.
  - Note this is not needed if your Conexiom is set up for first pass mapping.
  - See *First Pass Mapping QRC* for more details



\*A buyer is an authorized email and domain that can send in orders for the customer or vendor.

**Ops Test 1**  
More Success – Less Effort

100 Main St  
Vancouver, BC V4N 2M7  
Phone: 604-555-1234  
Fax: 604-555-1235

**PO #101**  
DATE: MAY 29, 2019

**TO:**  
Heb Smith  
ABC Company  
123 Pender Street  
Chicago, IL 60643  
Phone: 312-555-7890

**SHIP TO:**  
Andreas Bond  
Ops Test 1  
2300 Warehouse  
Burnaby, BC V9P 2G6  
Phone: 604-789-1234

**COMMENTS OR SPECIAL INSTRUCTIONS:**  
Ring my bell when delivering

SALESPERSON	DELIVERY DATE	JOB NUMBER	SHIPPED VIA	F.O.B. POINT	TERMS
Herb Smith	June 4, 2019	2300-14	UPS		

QUANTITY	UOM	DESCRIPTION	UNIT P
4	DOZEN	2TY755 - 1/2" Brass Coupler	\$1

## Annotation Tips and Tricks

- Ensure the file name contains “Annotated”
- To annotate a PDF document, use the Highlighting AND Comments features together.
  - Comments provide clarity on ambiguous fields, which means fewer assumptions and therefore fewer follow-up change requests.
- Put any transformations and logic in the body of the change request and not on the annotated document.

See *How To Annotate a Document QRC* for more details