



# PDF INTEGRATION SERVICE

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Implementation

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UK: +44 (0) 8450 571 234

US: +1 208 838 3700

Europe, Middle East & Africa: +00 971 5033 502964

Australia: +61420237512

[www.fourth.com](http://www.fourth.com)

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# Welcome

**Thank you for choosing to integrate your invoices and credits using Fourth's PDF invoicing solution.**

You will shortly be contacted by one of our Implementation Data Team to initiate your project.

This presentation will guide you through the steps and changes that you will be asked to undertake to make your project a success.





# The Technology

Fourth's PDF Integration Service allows you to email system generated PDF documents to a specific email address where they are converted into an electronic format to be passed directly to the ordering platform your customers use.

- There is no requirement to develop any additional technology on your part.
- The information is handled electronically so there is no need for any party to re-key information removing the risk of errors.
- Your financial documents are aligned directly to deliveries only those that do not match require any further action meaning that your documents get processed and paid as efficiently as possible.



# Requirements

There are a few rules that we will need you to confirm you can work within in order for your project to be a success.

- You will need to be able to provide a unique account reference for each delivery location on all your documents\*.
  - This allows us to make sure your document reaches the right people.
- You will need to provide a Purchase Order Reference on all your documents\*.
  - This allows us to align your documents to the correct delivery.
  - In most cases this will need to be the original PO ref provided on the order.
- You must provide a unique product code for every product.
- Every document must have its own unique reference\*
- Your documents have to be system generated, not scans or photos.

*\* with the exception of Catalogues*





# Process Changes

The Requirements mentioned previously may require certain business process changes on your part.

- If you currently have a single statement account for your customer you will need to create a sub-account or new account for every delivery location.
- If you do not provide purchase order references you will need to implement a process to allow this information to be carried from the order on to your documents.
- If you do not receive orders at all from your customer you will need to confirm with them directly what their expectation is. There are certain circumstances in which this is acceptable.
- If you use the same product code for different pack sizes of product you may need to either create new codes or implement a process where the pack size is added to the product code to make them unique.
- If you are not able to output a PDF without printing you will need to contact your ERP System provider.



# The Project Steps

Our Implementation Team will guide you through the following steps.

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## Data Gathering

- You will be provided a data gathering document for you to populate with your delivery location account codes
- You will also be asked to provide a minimum of five of each document type.

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## Validation

- Our team will ensure your documents meet the requirements described earlier.

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## Configuration

- Validated documents will be mapped and tested. When they have been confirmed as successful you will be provided an email address for you to send your documents to once your customer has instructed you to do so.





# Live Support

Once you have begun sending your documents to the service we will support you to ensure your integration is working as it should.

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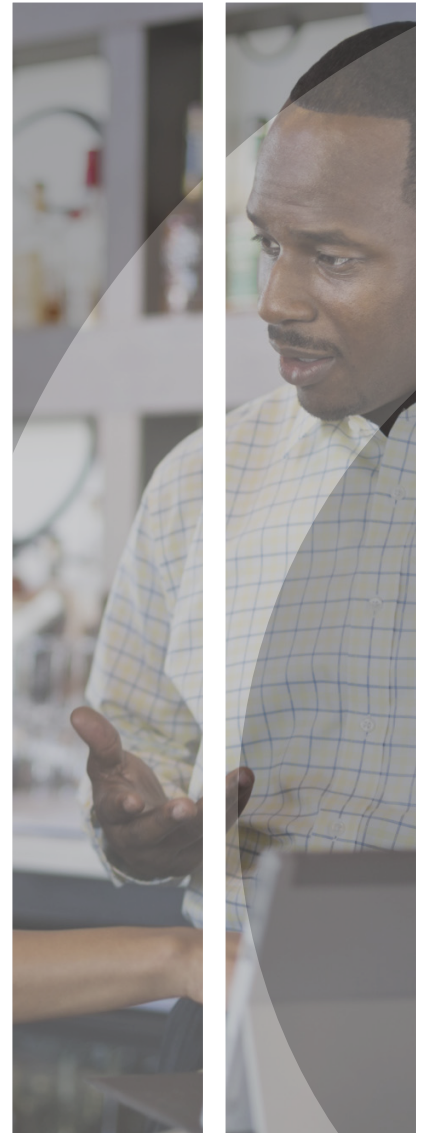
## Go-Live Care

- Our implementation team will be available for you to contact during the first week after you start sending documents.
- After this week and on the condition that no issues have been raised you will be handed to our Service (Business as Usual) team.

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## Ongoing Support

- You will receive a rejection notification directly from the service if your documents fall short of the requirements mentioned earlier. This notification will contain all the information you need to correct your documents and resend.
- You will have access to our customer community where you can find articles and guides.
- Our Service team are available to troubleshoot any other issues that arise.



# Fourth

[www.fourth.com](http://www.fourth.com)

+44 (0)8450 571234

[marketing@fourth.com](mailto:marketing@fourth.com)

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