

Collect

Invoice Date

1. Navigate to the Invoices Content Model
2. Right click on its Data Model and select Contents > Add Multiple Items...
3. In the Contents • Add Multiple Items window, make sure Item Type is set to **Data Field**
4. Edit the Item Names property and type out the names of the following fields
 - Invoice Number
 - PO Number
 - Invoice Date
 - Freight
 - Sales Tax
 - Discount
 - Invoice Amount
 - Payment Terms
 - Ship To
 - Remit To
5. Click Execute to complete

img/4-1/005

img/4-1/008

img/4-1/010

- a. Right click on the (local resources) folder and select Add > Folder...
- b. Give it a name, like **Extractors**

img/4-1/016

img/4-1/018

- a. Right click on the Extractors folder and select Add > Field Class...
- b. Name it **Invoice Date**

img/4-1/019

img/4-1/021

- a. In the General section, set the Value Extractor > Type property to Reference
- b. Set the Referenced Extractor property to the Data Extraction • Data Types > Downloads > Base Types > Date Data Type

img/4-1/029

- a. In the General section, set the Feature Extractor > Type property to Reference
- b. Set the Referenced Extractor property to the Data Extraction • Data Types > Training Materials > Features > Phrases Data Type

img/4-1/031

- a. Select Acme (1`)
- b. Click the Run Extraction button
- c. In the candidate list, right click on the 11/14/2008 value and select Train As Positive

img/4-1/034

- a. Select Standard (2)
- b. Select both of the 11/11/2008 candidates that have correct features
- c. Right click on either of them and select Train As Positive

img/4-1/039

- a. Select Express (3)
- b. Right click on the 12/2/2008 candidate with 58.1689% confidence and select Train As Positive

img/4-1/043

- a. Select Spartan (4)
- b. Click to edit the Context Zones property

img/4-1/048

- a. In the Context Zones window, edit the dimensions as follows:
- b. Zone 1:
 - i. Left: -3.278

ii. Top: **-0.054**

iii. Right: **0.312**

iv. Bottom: **0.054**

c. Zone 2:

i. Left: **-0.67**

ii. Top: **-0.37**

iii. Right: **0.5**

iv. Bottom: **0.04**

d. Click OK

img/4-1/050

img/4-1/052

a. Select Enid (5)

b. In the Output section, set the Minimum Confidence property to **70%**

img/4-1/060

img/4-1/062

a. In the Data Model, select the Invoice Date Data Field

b. In the General section, set the Value Extractor > Type property to Reference

c. Set the Referenced Extractor property to the Invoices • (local resources) > Extractors > Invoice Date Field Class.

d. In the Behavior section, set the Required property to **True**

img/4-1/063

img/4-1/065

img/4-1/068

Ship To

1. Right click on the Extractors folder and select Add > Field Class...

2. Name it **Ship To**

img/4-2/002

img/4-2/004

a. Right click on the Ship To Field Class and select Add > Data Type...

- b. Name it **[Features] Ship To**
- c. In the Data Extraction section, click to edit the Pattern

img/4-2/005

img/4-2/006

img/4-2/007

- a. In the Value Pattern editor, type:

ship to|shipped to|ship

- b. In the Output Format editor, type:

ship to

- c. Click OK

img/4-2/009

- a. Click on the Ship To Field Class
- b. In the General section, set the Value Extractor > Type property to Reference
- c. Set the Referenced Extractor property to the Data Extraction • Data Types > Training Materials > Base Types > Address Data Type

img/4-2/012

img/4-2/013

- a. In the General section, set the Value Extractor > Type property to Reference
- b. Set the Referenced Extractor property to the Extractors • Ship To > [Features] Ship To Data Type

img/4-2/014

- a. In the Context Scope Options section, click to edit the Context Zones
- b. In the Context Zones window, delete one of the zones
- c. Edit the dimensions of the remaining zone:
- d. Left: -1.25
- e. Top: -0.54
- f. Right: 0.73
- g. Bottom: 0.13
- h. Click OK
- i. Click Run Extraction

img/4-2/015

img/4-2/018

- a. In the candidate list, find the value that has features that can be trained
- b. Right click on that value and select Train As Positive
- c. Set the Minimum Confidence property to 70%

img/4-2/023

img/4-2/030

- a. In the Data Model, select the Ship To Data Field
- b. In the General section, set the Value Extractor > Type property to Reference
- c. Set the Referenced Extractor property to the Invoices • (local resources) > Extractors > Ship To Field Class.
- d. In the Behavior section, set the Required property to True

img/4-2/031

img/4-2/032

img/4-2/033

Remit To

-
- 1. Right click on the Extractors folder and select Add > Field Class...
 - 2. Name it Remit To
 - 3. In the General section, set the Value Extractor > Type property to Reference
 - 4. Set the Referenced Extractor property to the Data Extraction • Data Types > Training Materials > Base Types > Address Data Type

img/4-3/001

img/4-3/003

img/4-3/0004

- a. In the General section, set the Feature Extractor > Type property to Internal
- b. Click to edit the Pattern

img/4-3/006

- a. In the Value Pattern editor, type:

remit to|mail payment to|checks to

b. In the Output Format editor, type:

remit to

- c. Select Standard (2)
- d. Click on the Properties tab
- e. Change the Mode property to FuzzyRegEx
- f. In the Fuzzy Matching Options section, expand Fuzzy Match Weightings
- g. Click to edit Local Entries
- h. In the List Editor window, type:

li=0.25

- i. Click OK to close the List Editor
- j. Click OK to close the Pattern Editor

img/4-3/023-1

img/4-3/014

img/4-3/019

img/4-3/021

- a. Click to edit the Context Zones property
- b. In the Context Zones window, delete one of the zones
- c. Edit the dimensions of the remaining zone:
- d. Left: -2.55
- e. Top: -0.55
- f. Right: 1
- g. Bottom: 0.15
- h. Click OK

img/4-3/027

img/4-3/028

- a. Select Acme (1)
- b. In the candidate list, find the value that has features that can be trained
- c. Right click on that value and select Train As Positive
- d. Set the Minimum Confidence property to 70%

img/4-3/033

img/4-3/034

- a. In the Remit To Data Field, set the Value Extractor > Type property to Reference
- b. Set the Referenced Extractor property to the Invoices • (local resources) > Extractors > Remit To Field Class.
- c. In the Behavior section, set the Required property to **True**

img/4-3/040

img/4-3/041

Feature List

- 1. Navigate to (root) > Batch Processing > Batches > Test > Invoices
- 2. Click on the Batch Viewer tab
- 3. Collapse the Node Tree using the button in the toolbar
- 4. Open Notepad.exe alongside Grooper Design Studio

img/4-4/001

img/4-4/002

img/4-4/003

- a. Select Acme (1)
- b. In Notepad, begin typing a list of all words and phrases used to identify invoice items
- c. Do this for the remaining four vendors
- d. When complete, copy everything in Notepad to your clipboard

img/4-4/004

img/4-4/005

img/4-4/007

- a. Restore the default Grooper Design Studio view
- b. Navigate to Content Models > Invoices > (local resources)
- c. Right click and select Add > Folder...
- d. Name it **Lexicons**
- e. Right click on the Lexicons folder and select Add > Lexicon...
- f. Name it **Invoice Field Labels**

img/4-4/009

img/4-4/011

img/4-4/014

- a. Paste your list of field labels in the Edit Entries editor
- b. Right click in the Edit Entries editor and select Sort
- c. Right click in the Edit Entries editor and select Deduplicate
- d. Normalize synonymous phrases by setting an = sign between the original phrase and the desired transformed phrase

img/4-4/015

img/4-4/016

img/4-4/018

- a. Delete this Lexicon
- b. Navigate to (root) > Global Resources > Lexicons > Training Materials > Invoice Field Labels
- c. Right click and select Copy
- d. Right click on the Invoices > (local resources) > Lexicons folder and select Paste

img/4-4/019

img/4-4/021

img/4-4/022

img/4-4/023

- a. Right click on the (local resources) folder and select Add > Folder...
- b. Name it **_Global**
- c. Right click on the _Global folder and select Add > Data Type...
- d. Name it **Invoice Field Labels**
- e. Click to edit the Pattern

img/4-4/024

img/4-4/026

img/4-4/027

img/4-4/028

- a. In the Value Pattern editor, type:

```
[^\r\n\t\f:]+
```

- b. Click on the Properties tab

- c. Expand Preprocessing Options and set the Tab Marking property to Enabled

img/4-4/029

img/4-4/030

img/4-4/031

- a. In the Lookup and Translation section, click to edit the Lookup Options
- b. In the Lookup Options window, expand Vocabulary
- c. Select the Vocabulary > Included Lexicons property dropdown and check the box next to the Invoices • (local resources) > Lexicons > Invoice Field Labels Lexicon
- d. Set the Enable Translation property to **True**
- e. Set the Fuzzy Match Similarity property to **90%**
- f. Click OK

img/4-4/032

img/4-4/036

img/4-4/038

img/4-4/044

- a. In the Output Options section, click to edit Result Filter
- b. In the Result Filter window, set the Output Case property to **Lower**
- c. Click OK to close the Result Filter window
- d. Click OK to close the pattern editor window

img/4-4/047

img/4-4/049

- a. Right click on the (local resources) > _Global folder and select Add > Data Type...
- b. Name it **[Array] PO Number**
- c. Add two child Data Formats to the [Array] PO Number Data Type:
- d. Purchase
- e. Order Number

img/4-4/056

img/4-4/060

- a. Select the [Array] PO Number > Purchase Data Format
- b. Select Enid (5)
- c. In the Value Pattern editor, type:

purchase

d. In the Output Format editor, type:

po

img/4-4/061

img/4-4/062

- a. Select the [Array] PO Number > Order Number Data Format
- b. Select Enid (5)
- c. In the Value Pattern editor, type:

order number

d. In the Output Format editor, type:

number

img/4-4/063

- a. Select the [Array] PO Number Data Type
- b. Set the Collation property to Ordered Array
- c. Expand Collation and set the Vertical Layout property to Enabled
- d. Expand the Vertical Layout property
- e. Set the Maximum Distance property to 0.25
- f. Set the Alignment property to Center
- g. Set the Alignment Tolerance property to 0.1
- h. Set the Result Separator property to (a single space)

img/4-4/064

img/4-4/073

- a. Drag the [Array] PO Number Data Type on top of the Invoice Field Labels Data Type
- b. Select the Invoice Field Labels Data Type to ensure the array is now being included in the results

img/4-4/075

img/4-4/076

img/4-4/077

img/4-4/078

Invoice Number

1. Right click on the Extractors folder and select Add > Field Class...
2. Name it **Invoice Number**



- Create a child Data Type under the Invoice Number Field Class
- Name it **[Values] Invoice Number**
- Create three child Data Formats under the [Values] Invoice Number Data Type and name them:
 - Acme/Standard/Express**
 - Enid**
 - Spartan**



Edit the patterns for each of the Data Formats: - Acme/Standard/Express

Value Pattern
[0-9]{6,16}

- ### 3. Enid

Value Pattern	
	<code>([A-Z]{3})/([@Number]{8})</code>
Output Format	

- #### 4. Spartan

Value Pattern
<code>([A-Z]{2})([@Number]{2})-([@Number]{6})</code>
Output Format

img/4-5/011

- a. Select the Invoice Number Field Class
- b. In the General section, set the Value Extractor > Type property to Reference
- c. Set the Referenced Extractor property to the Extractors • Invoice Number > [Values] Invoice Number Data Type
- d. Set the Feature Extractor > Type property to Reference
- e. Set the Referenced Extractor property to the Invoices • (local resources) > _Global > Invoice Field Labels Data Type
- f. Select Acme (1)
- g. Click Run Extraction

img/4-5/014

img/4-5/015

img/4-5/016

- a. In the candidate list, find the value that has the appropriate feature(s) to train
- b. Right click and select Train As Positive

img/4-5/019

- a. Select Spartan (4)
- b. Click to edit the Context Zones property
- c. In the Context Zones window, edit the dimensions as follows:
- d. Zone 1:
 - i. Left: -4
 - ii. Top: -0.02
 - iii. Right: 0.35
 - iv. Bottom: 0.1
- e. Zone 2:
 - i. Left: -1
 - ii. Top: -0.25
 - iii. Right: 0.375
 - iv. Bottom: 0.05
- f. Click OK

img/4-5/027

img/4-5/029

img/4-5/031

img/4-5/032

- a. Click on the [Values] Invoice Number Data Type
- b. In the Deduplication section, set the Deduplicate Locations property to **True**

img/4-5/038

- a. Click on the Invoice Number Field Class
- b. In the Output section, set the Minimum Confidence property to **70%**

img/4-5/042

- a. In the Data Model, select the Invoice Number Data Field
- b. In the General section, set the Value Extractor > Type property to Reference
- c. Set the Referenced Extractor property to the Invoices • (local resources) > Extractors > Invoice Number Field Class.
- d. In the Behavior section, set the Required property to **True**

img/4-5/043

img/4-5/044

img/4-5/045

PO Number/Exclusion Extractor

-
- 1. Right click on the (local resources) > _Global folder and select Add > Data Type...
 - 2. Name it **Addresses, Phone Numbers**
 - 3. In the Data Extraction section, click to edit Referenced Extractors

img/4-6/001

img/4-6/003

img/4-6/004

- a. In the Referenced Extractors window, click Add...
- b. In the Select Items window, expand (root) • Data Extraction > Data Types > Training Materials > Base Types and check the following:
- c. Address
- d. Phone Number
- e. Click OK to close the Select Items window

f. Click OK to close the Referenced Extractors window

img/4-6/005

img/4-6/007

img/4-6/008

img/4-6/009

- a. Right click on the Extractors folder and select Add > Field Class...
- b. Name it **PO Number**
- c. Create a child Data Type of PO Number and name it **[Values] PO Number**
- d. On the [Values] PO Number Data Type, click to edit the Pattern

img/4-6/013

img/4-6/015

img/4-6/016

- a. In the Value Pattern editor, type:

`[0-9]{4,16}`

- b. Click OK

img/4-6/018

- a. On the [Values] PO Number Data Type, in the Data Extraction section, set the Exclusion Extractor > Type property to **Reference**
- b. Set the Referenced Extractor property to the Invoices • (local resources) > _Global > **Addresses, Phone Numbers** Data Type

img/4-6/021

- a. Click on the PO Number Field Class
- b. In the General section, set the Value Extractor > Type property to Reference
- c. Set the Referenced Extractor property to the Extractors • PO Number > **[Values] PO Number** Data Type
- d. In the General section, set the Feature Extractor > Type property to Reference
- e. Set the Referenced Extractor property to the Invoices • (local resources) > _Global > Invoice Field Labels Data Type

img/4-6/025

img/4-6/027

- a. Select Acme (1)

- b. Click Run Extraction
- c. In the candidate list, find the value that has the appropriate feature(s) to train
- d. Right click and select Train As Positive

img/4-6/029

img/4-6/030

- a. Click to edit the Context Zones property
- b. In the Context Zones window, edit the dimensions as follows:
- c. Zone 1:
 - i. Left: -3.278
 - ii. Top: -0.054
 - iii. Right: 0.312
 - iv. Bottom: 0.054
- d. Zone 2:
 - i. Left: -0.67
 - ii. Top: -0.37
 - iii. Right: 0.5
 - iv. Bottom: 0.04
- e. Click OK
- f. In the Output section, set the Minimum Confidence property to 70%

img/4-6/034

img/4-6/036

img/4-6/038

img/4-6/041

- a. In the Data Model, select the PO Number Data Field
- b. In the General section, set the Value Extractor > Type property to Reference
- c. Set the Referenced Extractor property to the Invoices • (local resources) > Extractors > PO Number Field Class.
- d. In the Behavior section, set the Required property to True

img/4-6/042

img/4-6/044

img/4-6/046

Invoice Amount

1. Right click on the Extractors folder and select Add > Field Class...
2. Name it **Invoice Amount**

img/4-7/001

img/4-7/003

- a. In the General section, set the Value Extractor > Type property to Reference
- b. Set the Referenced Extractor property to the Data Extraction • Data Types > Downloads > Base Types > **Currency Data** Type
- c. Set the Feature Extractor > Type property to Reference
- d. Set the Referenced Extractor property to the Invoices • (local resources) > _Global > Invoice Field Labels Data Type

img/4-7/005

img/4-7/007

- a. Select Acme (1)
- b. Click Run Extraction
- c. In the candidate list, find the value that has the appropriate feature(s) to train
- d. Right click and select Train As Positive

img/4-7/011

img/4-7/012

- a. Click to edit the Context Zones property
- b. In the Context Zones window, edit the dimensions as follows:
- c. Zone 1:
 - i. Left: **-4**
 - ii. Top: **-0.05**
 - iii. Right: **0.2**
 - iv. Bottom: **0.1**
- d. Zone 2:
 - i. Left: **-0.58**
 - ii. Top: **-0.36**

iii. Right: 0.3

iv. Bottom: 0.05

e. Click OK

f. In the Output section, set the Minimum Confidence property to 70%

img/4-7/013

img/4-7/015

img/4-7/017

img/4-7/021

a. In the Data Model, select the Invoice Amount Data Field

b. In the General section, set the Value Type to Decimal

c. Expand Value Type and set the Format Specifier property to c2

img/4-7/022

img/4-7/025

img/4-7/028

a. In the General section, set the Value Extractor > Type property to Reference

b. Set the Referenced Extractor property to the Invoices • (local resources) > Extractors > Invoice Amount Field Class.

c. In the Behavior section, set the Required property to True

img/4-7/029

img/4-7/030

img/4-7/032

Payment Terms

-
1. In the Data Model, select the PO Number Data Field
 2. In the General section, set the Value Extractor > Type property to Internal
 3. Click to edit the pattern

img/4-8/001

img/4-8/003

a. Select Acme (16)

b. In the Value Pattern editor, type:

n[**eo**]t ([@**Number**]{2})

c. In the Output Format editor, type:

Net {1:**Number**}

d. Click OK

img/4-8/007

a. On the Payment Terms Data Field, set the Required Property to **True**

img/4-8/010

Freight

1. Right click on the Extractors folder and select Add > Data Type...

2. Name it **Freight**

img/4-9/001

img/4-9/003

a. As child extractors under the Freight Data Type, create:

b. Data Format: **Acme**

c. Data Format: **Enid**

d. Data Format: **Express**

e. Data Format: **Standard**

f. Data Type: **Spartan**

img/4-9/004

img/4-9/006

img/4-9/010

img/4-9/012

Edit the patterns for each of the Data Formats: - Acme

Make sure to enable Tab Marking

Value Pattern

([@**Number**.]{3,12})

Look Ahead Pattern	Look Behind Pattern	Output Format
--------------------	---------------------	---------------

3. Enid

Value Pattern		
([@Number.]{3,12})		
Look Ahead Pattern	Look Behind Pattern	Output Format

4. Express

Value Pattern	
([@Number.]{3,12})	
Look Ahead Pattern	Output Format

5. Standard

Value Pattern	
([@Number.]{3,12})	
Look Ahead Pattern	Output Format

img/4-9/017

img/4-9/019

img/4-9/021

img/4-9/023

- a. Create two Data Formats as children of the Spartan Data Type:
- b. Freight
- c. Value 1
- d. Edit the Value Patterns for each of the Data Formats:

Freight
freight
Value 1

6. Right click on the Value 1 Data Format and select Clone

7. Name the clone Value 2

img/4-9/025

img/4-9/027

img/4-9/029

img/4-9/023

- a. Select the Spartan Data Type

- b. Set the Collation property to **Ordered Array**
- c. Expand Collation and set the Vertical Layout property to **Enabled**
- d. Expand the Vertical Layout property
- e. Set the Maximum Distance property to **0.25**
- f. Set the Combine Method property to **Sum**

img/4-9/035

img/4-9/037

img/4-9/039

img/4-9/045

- a. In the Data Model, select the Freight Data Field
- b. In the General section, set the Value Type to **Decimal**
- c. Expand Value Type and set the Format Specifier property to **c2**
- d. In the Expressions section, set the Default Value Expression property to **0**

img/4-9/050

img/4-9/052

img/4-9/054

img/4-9/056

- a. In the General section, set the Value Extractor > Type property to Reference
- b. Set the Referenced Extractor property to the Invoices • (local resources) > Extractors > **Freight** Data Type.

img/4-9/058

img/4-9/059

Discount

-
1. Right click on the Extractors folder and select Add > Data Type...
 2. Name it **Discount**

img/4-10/002

img/4-10/003

- a. Create two Data Types as children of the Discount Data Type:
- b. **Acme**

- c. Enid
- d. Select the Acme Data Type and click to edit its Pattern

img/4-10/004

img/4-10/005

img/4-10/006

- a. Click on the Properties tab and set the Preprocessing Options > Tab Marking property to True
- b. Click back to the Pattern Editor tab
- c. In the Value Pattern editor, type:

```
[@Number., ]{3,12}
```

- d. In the Look Ahead Pattern editor, type:

```
cust\.\sdiscount\s%(\t|\r\n)[^\t]+\t
```

- e. In the Output Format editor, type:

```
{0:Number}
```

- f. Click OK to close the pattern editor window

img/4-10/008

img/4-10/010

- a. Select Acme (14)
- b. In the Output section, set the Collation property to Combine
- c. Expand Collation and set the Combine Method property to Sum

img/4-10/013

img/4-10/015

img/4-10/018

Create two Data Formats as children of the Enid Data Type - [Key] Enid - Discount - [Value] Enid - Discount

img/4-10/021

- a. Select the [Key] Enid - Discount Data Format
- b. Select Enid (5)
- c. In the Value Pattern editor, type:

```
order discount amount
```

img/4-10/022

- a. Click on the Properties tab
- b. In the General section, set the Mode property to **FuzzyRegEx**
- c. In the Fuzzy Matching Options section, set the Minimum Similarity property to **85%**
- d. Expand Fuzzy Match Weightings and click to edit Local Entries
- e. In the List Editor window, type:

```
)D=0.1
```

- f. Click OK to close the List Editor window

img/4-10/025

img/4-10/026

img/4-10/028

img/4-10/029

- a. Select the [Value] Enid - Discount Data Format
- b. In the Value Pattern editor, type:

```
\d{1,6}\.\d{2,3}
```

img/4-10/031

img/4-10/032

- a. Select the Enid Data Type
- b. In the Output section, set the Collation property to **Key-Value Pair**
- c. Expand Collation and set the Horizontal Layout property to **Enabled**

img/4-10/033

img/4-10/035

img/4-10/038

- a. In the Data Model, select the Discount Data Field
- b. In the General section, set the Value Type to **Decimal**
- c. Expand Value Type and set the Format Specifier property to **c2**
- d. In the Expressions section, set the Default Value Expression property to **0**

img/4-10/040

img/4-10/042

img/4-10/044

img/4-10/047

- a. In the General section, set the Value Extractor > Type property to Reference
- b. Set the Referenced Extractor property to the Invoices • (local resources) > Extractors > Discount Data Type.

img/4-10/046

img/4-10/047

Sales Tax

1. Right click on the Extractors folder and select Add > Data Type...
2. Name it Sales Tax
3. Create two Data Formats as children of the Sales Tax Data Type
 - Express
 - Standard

img/4-11/003

img/4-11/004

Edit the patterns for each of the Data Formats: - Express

Value Pattern	
([@Number.]{4,12})	
Look Ahead Pattern	Output Format

4. Standard

Value Pattern	
([@Number.]{3,12})	
Look Ahead Pattern	Output Format

img/4-11/006

img/4-11/008

- a. In the Data Model, select the Sales Tax Data Field
- b. In the General section, set the Value Type to Decimal
- c. Expand Value Type and set the Format Specifier property to c2

d. In the Expressions section, set the Default Value Expression property to **0**

img/4-11/009

img/4-11/011

img/4-11/012

- a. In the General section, set the Value Extractor > Type property to Reference
- b. Set the Referenced Extractor property to the Invoices • (local resources) > Extractors > **Sales Tax** Data Type.

img/4-11/014

- a. Add a new folder to (local resources)
- b. Name it **Overrides**

img/4-11/018

- a. In the Overrides folder, add a Field Class
- b. Name it **[Enid] Sales Tax**

img/4-11/020

- a. Set the Value Extractor > Type property to **Internal**
- b. Click to edit the pattern:

Value Pattern
([@Number .] {2, 12})
Output Format

- 5. Set the Feature Extractor > Type property to **Reference**
- 6. Set the Referenced Extractor property to the Data Extraction • Data Types > Training Materials > Features > **Phrases** Data Type

img/4-11/021

img/4-11/023

img/4-11/024

- a. Click to edit the Context Zones property
- b. In the Context Zones window, delete one of the zones
- c. Edit the dimensions of the remaining zone:

	Zone
Left	-2.4
Top	-0.2
Right	0.25
Bottom	0.1

7. Click OK to close the Context Zones window
8. In the Output section, set the Minimum Confidence property to 90%

img/4-11/027

img/4-11/030

img/4-11/033

- a. Navigate to the (root) > Content Models > Invoices > Enid Document Type
- b. Click on the Data Element Profiles tab
- c. Click on the Sales Tax Data Field and click the + button in the toolbar

img/4-11/034

img/4-11/035

img/4-11/036

img/4-11/037

- a. In the properties panel, set the ESP™ Extraction Overrides > Override Extractor property to True
- b. Expand Extractor and set the Extractor > Type property to Reference
- c. Set the Referenced Extractor property to the Invoices • (local resources) > Overrides > [Enid] Sales Tax Field Class

img/4-11/039

img/4-11/040

Data Model Adjustments

1. Navigate to the Ship To Data Field
2. In the Appearance section, set the Display Width property to 110
3. In the Behavior section, set the Multi Line property to Enabled
4. Expand Multi Line and set the Multi Line Height property to 45

5. Set the Word Wrap property to **True**

img/4-12/002

img/4-12/003

img/4-12/004

- a. Right click on any of the property names and select Copy Properties > Selected Properties...
- b. In the Select Properties window, check the boxes next to the properties to copy:

Display Width

Multi Line

img/4-12/010

img/4-12/011

img/4-12/012

- a. Navigate to the Remit To Data Field
- b. Right click on any of the property names and select Paste Properties

img/4-12/013

img/4-12/014

img/4-12/015

- a. Navigate to the Data Model itself
- b. In the Child Element Options section, set the Show Fields In Grid property to **True**
- c. In the toolbar, click the Test Extraction button to test all fields against a document

img/4-12/016

img/4-12/018

img/4-12/019