

ABBYY Vantage

Connector to process documents through
ABBYY Vantage in Zapier

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About the ABBYY Vantage connector for Zapier

The Zapier connector for ABBYY Vantage enables seamless integration of ABBYY Vantage Skills into automation workflows. It processes documents by sending new files from a specified OneDrive folder to ABBYY Vantage via API for data extraction. The extracted output, including a file download link, is fetched and can be used for further processing. This connector simplifies document handling and enhances data extraction capabilities within your Zapier workflows.

System requirements

You will require an ABBYY Vantage account, a valid subscription for ABBYY Vantage, and a Vantage user that is Skill User to process documents in Abbyy Vantage.

The connector for Zapier can be used with:

- ABBYY Vantage 2.4 or later
- Zapier with free or paid version

Setting up the connector

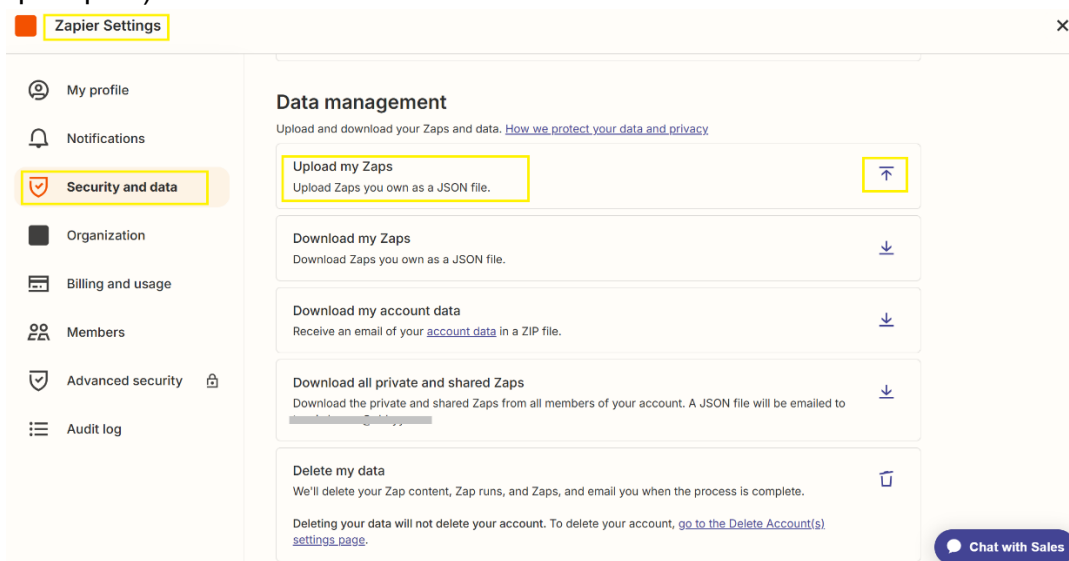
To set up the connector, perform the following steps:

Importing the package

The Zapier connector is a set of activities and sub-zaps in a Main Zap on the Zapier. The Main Zap can be used as template.

To set this connector, follow the below step:

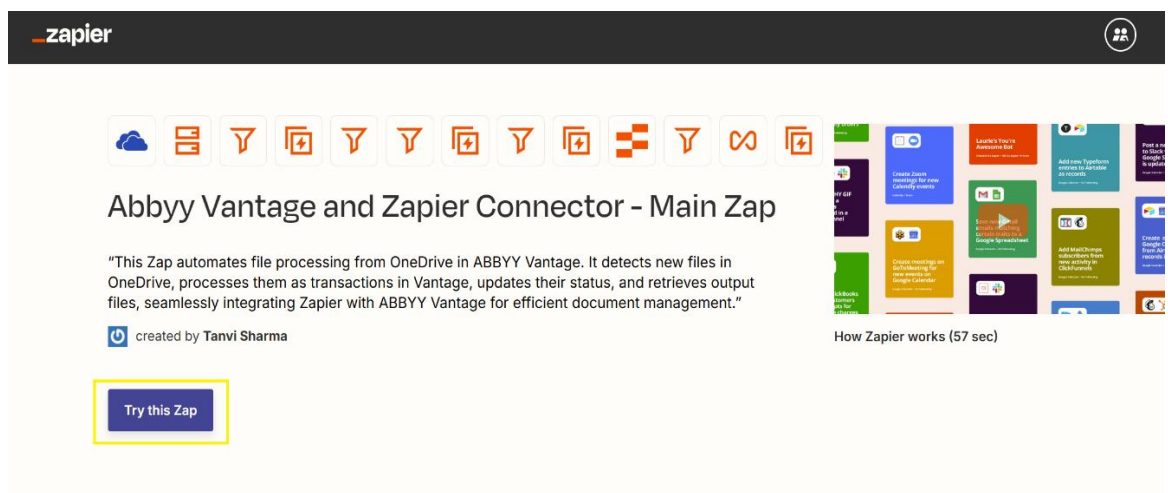
1. Request for adding the
2. Access the connector main template by using the link (<https://zapier.com/shared/5be94235196b90fcd1f3b7d520cd079abb0a6bdb>).
3. This is a template, which you can copy or **duplicate** in Zapier. If you have paid version, then you can import the json file of the connector in Zapier.
 - 3.1 To import the json file into Zapier follow the below steps:
 - i. Log in to your Zapier account and navigate to Zapier Settings.
 - ii. Under **Security and data** click on **Upload my Zap** option (visible for users with a paid plan).



- iii. Select the JSON file you want to import from your local system.
- iv. Follow the prompts to upload and configure the Zap.
- v. Save the imported Zap and test it to ensure proper functionality.

3.2 To duplicate the Main template and its sub-zap in Zapier follow the below steps:

- i. Open the shared link provided above.
- ii. Click the **Try this Zap** button.
- iii. Save the Zap under your account by providing a new name.
- iv. If the template includes sub-Zaps, open each one individually and repeat the duplication process.



4. Click **Save**.
5. Once the template is imported/duplicate in Zapier, the template (Zap) is available for automation workflow.

Configuring the connector

To configure the ABBYY Vantage connector for Zapier you need to create Public API Client in ABBYY Vantage and then perform the connector setup.

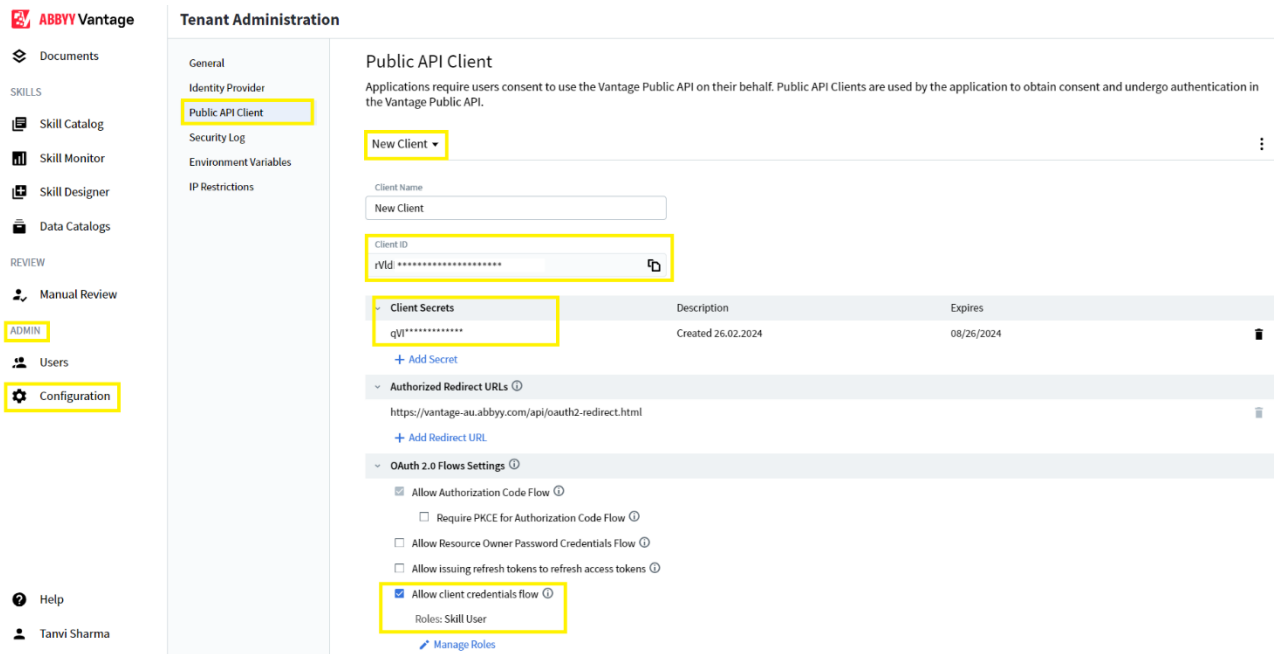
Below are the detailed steps to complete the process of configuring the connector:

ABBYY Vantage Public API Client

Create Public API Client in ABBYY Vantage by following the below steps:

1. In your ABBYY Vantage tenant navigate to Admin and configuration.
2. In Configuration navigate to Public API Client and create a new client
3. Save the client id and client secret generated. These values will be used as input parameters in the connector.

- 4. In Public API Client provide the roles as “Skill User” and allow “client credentials” flow in OAuth 2.0 Flows Settings.



ABBY Vantage Skill ID

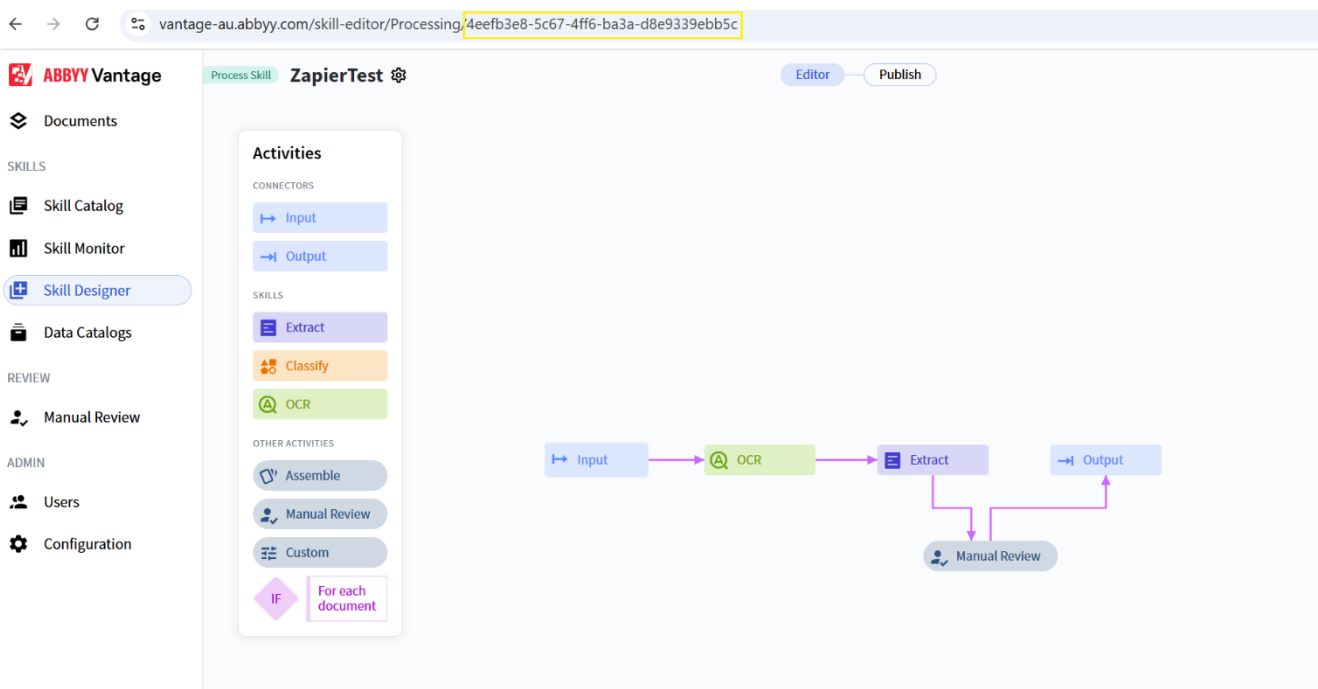
To use the connector, you need the Vantage Skill ID. You can find it in the Skill URL. When you open a Skill in ABBYY Vantage, the URL will look like this: <https://<your-vantage-uri>/skills/<skill-id>>

The Skill ID is the part after /skills/. Example:

URL: <https://vantage-au.abby.com/skill-editor/Processing/4eefb3e8-5c67-4ff6-ba3a-d8e9339ebb5c>

Skill ID: 4eefb3e8-5c67-4ff6-ba3a-d8e9339ebb5c

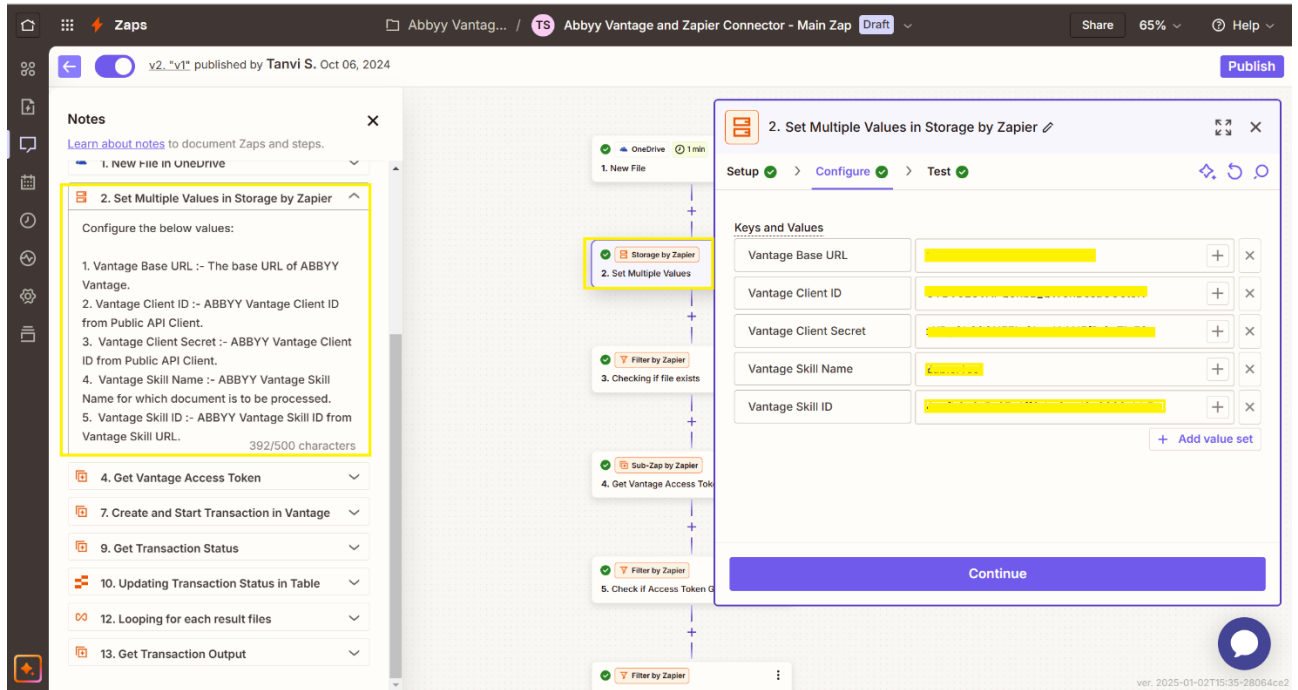
Copy this ID and provide this to the “Vantage Skill ID” variable when setting up the connector.



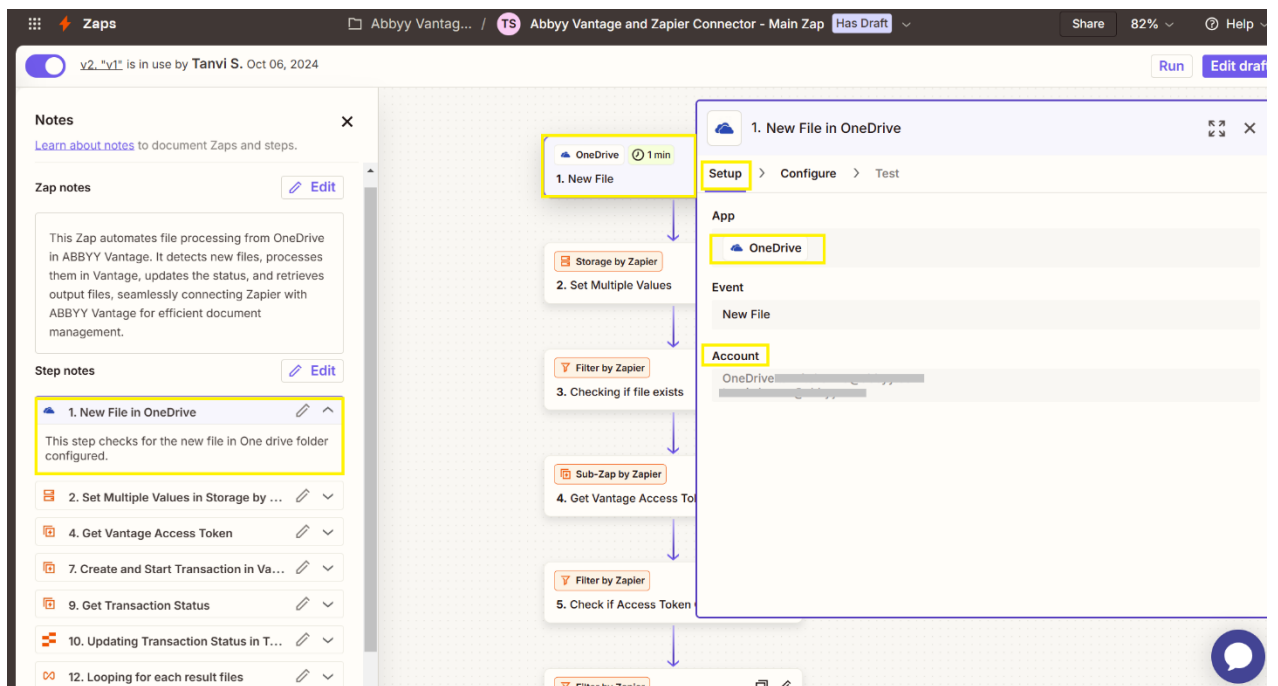
Connector setup

To use the connector, use the below steps to configure the connector:

1. Open the template in Zapier.
2. Once zap is imported or duplicated you can set up the below variables to store the basic input values in Zap Storage.



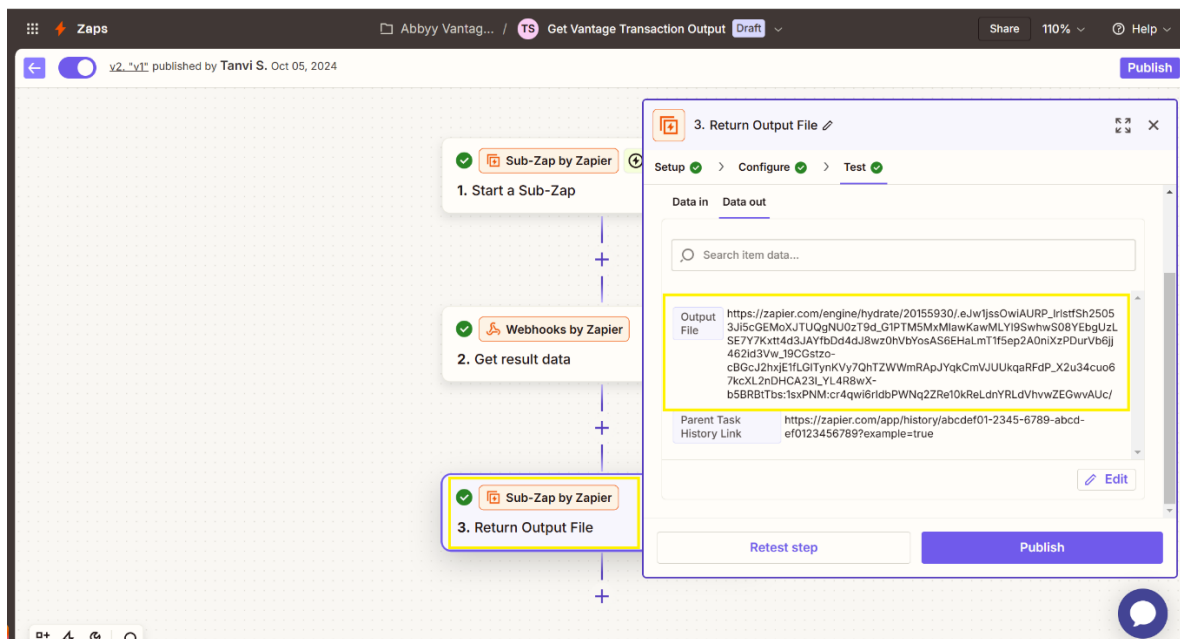
3. For all “One Drive” activity in the template setup the connection with your account, by selecting-up the connection with the account.



Using the connector

Once the connector configuration is completed, you can run the template to process a document and extract its data. The main Zap triggers the following sub-Zaps, which can also be customized or used independently based on your requirements:

- **Get Vantage Access Token:** Generates the Vantage access token after successful authorization.
- **Create and Start Transactions:** Creates and starts a new transaction to process the document and extract the required data.
- **Fetch Transaction Status:** Checks the transaction status and retrieves updates for the document processed in Vantage.
- **Get Vantage Transaction Output:** Fetches the extracted data from the Vantage transaction. The output includes a file download link that can be used for further processing.



In the main Zap, details like Vantage Transaction ID, Status, and Manual Review Link (if extracted) are stored in a Zapier table for reference at any step in the process.

