

# Document Management Link

“Easy access to essential documents directly from your Sage 300 screens”



## Why use Document Management Link?

Document Management Link (DML) builds upon your existing scanning and storage regime to make relevant files easily accessible to Sage 300 users, where and when they are likely to be needed.

## Flexible Configuration

You specify where and when document links will appear in Sage 300 by linking them to:

- Any screen (including 3rd Party modules developed in the SDK)
- Any field (including grid fields, but not check-boxes or drop-downs)
- Any 2 fields (e.g. a combination of Vendor & Item)
- Any data (e.g. specific Customers, Items, batches, transactions)
- Any user (by configuring role-based rules)

Support collaboration and remote working by overcoming your reliance on physical documents.

## Network Folder benefits

- Map your folder to cloud-based file sharing services (e.g. Dropbox, Google Drive, or Microsoft OneDrive) to take advantage of their synchronization and sharing capabilities
- Email files directly from the DML Alert Box, using Microsoft Outlook

## SharePoint integration

- Benefit from SharePoint's collaboration and security features
- Automatically trigger standard SharePoint workflows for notification, approval, or feedback when you add a document to DML
- Create & trigger custom SharePoint workflows

## Document Storage & Sharing

Nominate where linked documents reside. This can be a shared network folder, or within Microsoft SharePoint, or a combination of both.

The image shows two screenshots from the Sage 300 software. The left screenshot is the 'SAMLTD - A/P Invoice Entry' window. It shows fields for 'Entry Number' (1200), 'Vendor Number' (1200), and 'Document Number' (IN00099). A table at the bottom shows 'Description' and 'Amount'. The right screenshot is a file explorer window titled 'SAMLTD - A/P Invoice Entry' showing a list of files and folders. Three callouts with arrows point to specific elements in the file explorer:

- Specific Invoice
- All Documents for Vendor
- Vendor Contracts in SharePoint

Documents linked to Vendor and/or Invoice, stored in Network Folders and SharePoint

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## Viewing Documents

When the user opens a Sage 300 screen that references the configured fields:

- An 'Alert Box' will open to reveal any documents that have been linked to field values on that screen
- The user can then open those documents, or add new ones
- You can also link to sub-directories, e.g. for access to archived documents

## Adding Documents


- Drag & drop documents directly into the DML Alert Box
- This can trigger an automatic file rename, based on rules you nominate
- Emails and/or email attachments can be dragged and dropped into DML directly from your Outlook desktop client
- Any document saved in the configured folder becomes available for display in DML, including those originating outside Sage 300

 Link a document in one Sage 300 company and have it automatically appear in another when used with Orchid's **Inter-Entity Suite**.

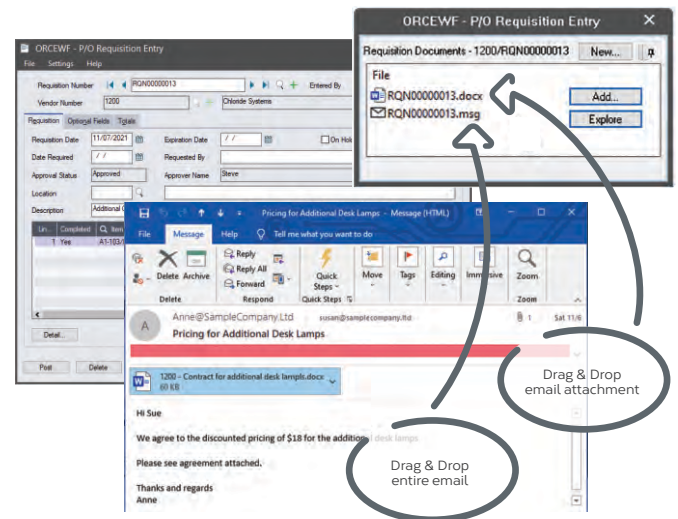
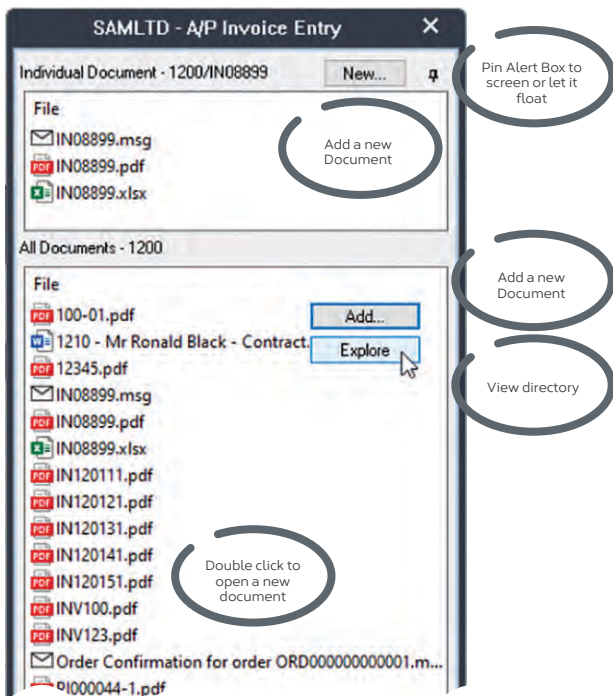
## Use Case Examples

Almost any document can be shared using DML. Here are just a couple of examples.

- Link an A/P Invoice during entry, making it also visible from the A/P Vendor Activity and A/P Payment Entry screens
- Link a delivery document during O/E Order Entry, making it also visible from the O/E Shipment Entry and O/E Invoice Entry screens

 Everyone loves DML! Staff in different locations can see the relevant documents, and no more hunting around for lost paperwork!

BONNIE WITTMER, EQUATION TECHNOLOGIES INC., CA, USA



## More Information

Further information about Document Management Link, including videos, is available from Orchid's Website: [www.orchid.systems/products](http://www.orchid.systems/products).

## Minimum Requirements

Document Management Link (DML) requires Sage 300 System Manager. DML User licences are required to access DML functionality. (The first concurrent DML User licence is included when you purchase DML.) Microsoft SharePoint (on-premises version supported by Microsoft or SharePoint for Office 365) is required to take advantage of SharePoint features. Features relate to the latest supported version.

## Contact your Sage Software Solution Provider

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