Document Management Link

"Easy access to essential documents directly from your Sage 300 screens"

I CAN EASILY ACCESS DOCUMENTS FROM WITHIN SAGE 300, EVEN WHEN I'M OUT OF THE OFFICE.
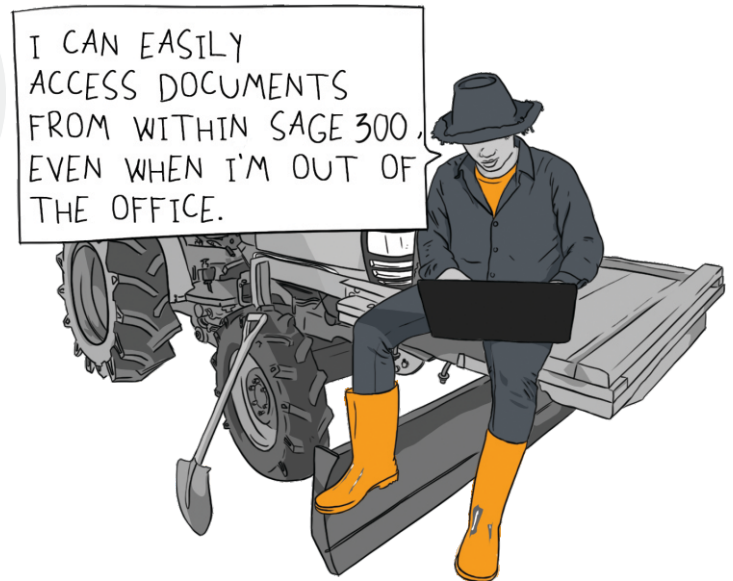
Why use Document Management Link?

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)

Document Storage & Sharing

Nominate where linked documents will reside, based on your requirements and whether you use the Sage 300 desktop or web screens.

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

Network Folder benefits

- Available to both Sage 300 desktop and web screen users.
- Sync a cloud-based file-sharing service (e.g. Dropbox, Google Drive, Microsoft OneDrive) to your network folder and make use of its synchronization and sharing capabilities.
- Sage 300 desktop users can email files directly from the DML Alert Box using Microsoft Outlook.

SharePoint integration

- Only available to Sage 300 desktop users.
- 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, or create custom SharePoint workflows.
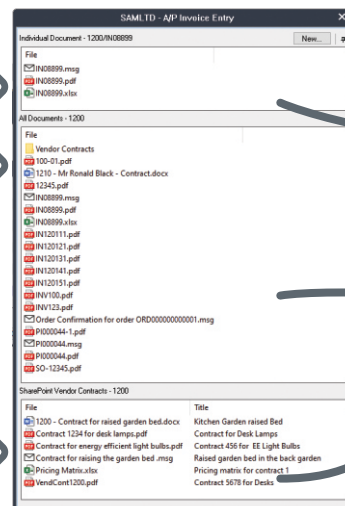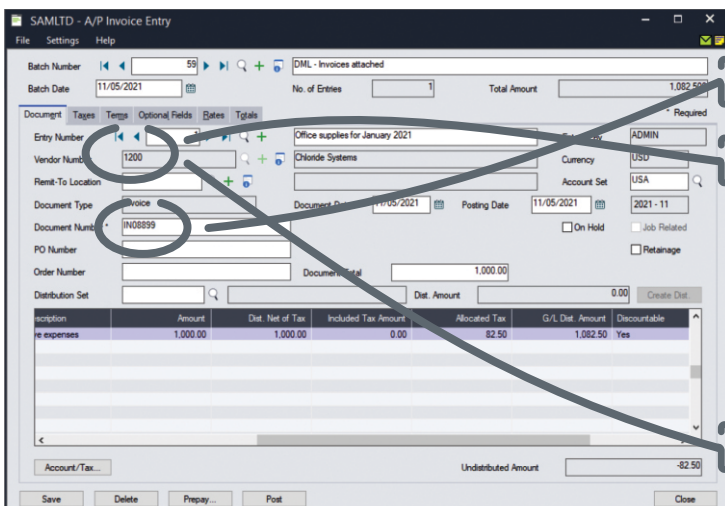
Sage 300 Desktop screen: Documents linked to Vendor and/or Invoice, stored in Network Folders and SharePoint

Work smarter with Orchid

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 an Outlook desktop client running on the same machine as Sage 300
- 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 some 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
- Make Employee contracts accessible from Sage 300
- Add supporting documents to GL journals
- Item-related documents, e.g. label or quality assurance instructions

Sage 300 Web screen: Documents linked to selected Vendor and Invoice

Everyone loves DML! Staff in different locations can see the relevant documents, and no more hunting around for lost paperwork!
BONNIE WITTMEIER, EQUATION TECHNOLOGIES INC., CA, USA

www.**orchid**.systems
SYDNEY | AUSTRALIA
info@orchid.systems

More Information

Further information about Document Management Link, including videos, is available from Orchid's Website: 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

V-25.1