

# Document Management Link

For Sage 300 (Accpac)



Development  
Partner Endorsed  
Development  
Partner Gold



Presents relevant documents when and where you need them  
Drag & drop, rename and view, from any Sage 300 screen  
Store documents in a network folder, or use with SharePoint

## WHAT IS DOCUMENT MANAGEMENT LINK?

Document Management Link (DML), from Orchid Systems, allows you to link multiple files and documents to Sage 300 (Accpac) fields, and access them directly from your existing Sage 300 screens.

It puts documents where you can find them, when you need them.

- Linked documents can be accessed from any Sage 300 screen or transaction record that references a nominated field.
- You control how and where documents are displayed, including optional role-based filters.
- Add new documents by drag and drop from within Sage 300, and have them automatically renamed to conform to your own naming convention.

The result – an economical document management system. Use it to streamline all processes that require supporting documentation, while reducing your reliance on paper-based documentation.



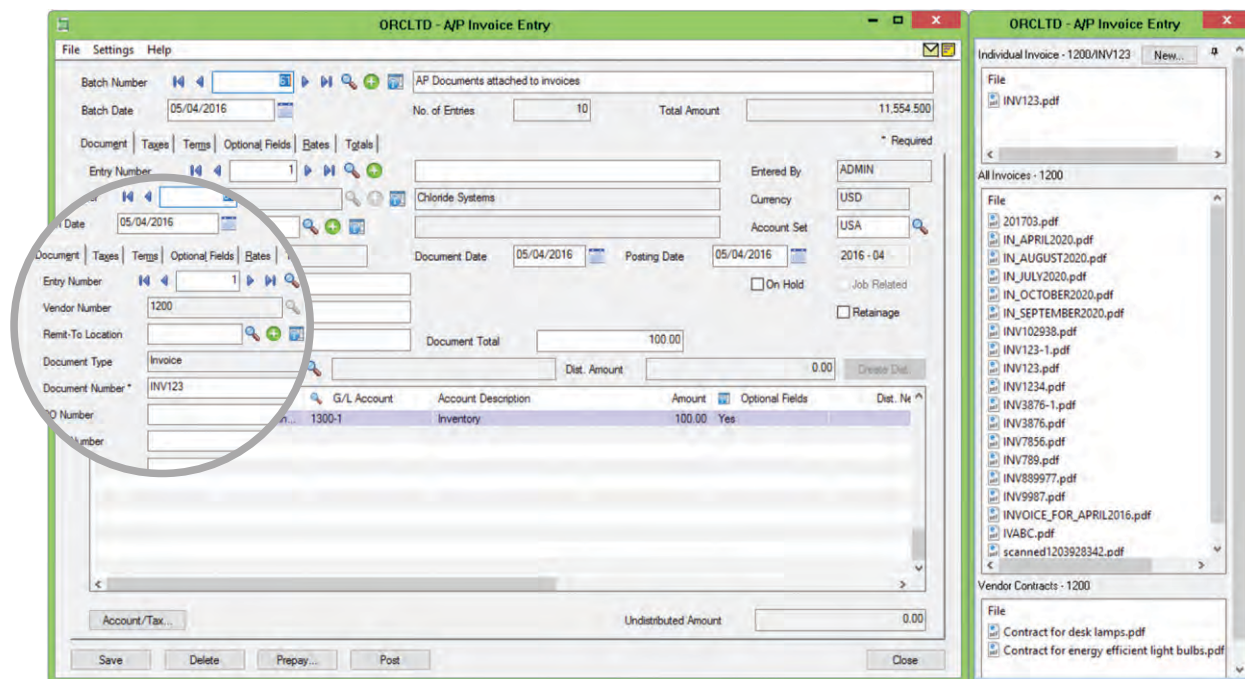
Works well with Orchid Notes. Show tailored contextual information alongside links to documents.

## BENEFITS

- Improved customer service - essential documents easily found and accessed.
- Improved productivity – documents are always available, no more searching for them.
- Streamlined operations - with supporting documents linked to the right record.
- Improved multi-site operations - access from Sage 300, no need to distribute hard copies.
- Reduced costs - less storage, copying, printing, consumables and keeping of multiple copies.
- Builds on your existing scanning and document capture systems.



Shows the right documents where you need them without having to search or browse, all in the context of Sage 300



Document Management Link screen can appear on the Sage 300 screen, or beside it, or can be viewed on a separate monitor



## DOCUMENT STORAGE & SHARING OPTIONS

You nominate where linked documents are to be stored, either in an accessible file server folder, or within Microsoft SharePoint.

- By nominating a file server folder that has been mapped to a cloud-based file sharing service (e.g. Dropbox, Google Drive, or Microsoft OneDrive) you can take advantage of the synchronisation and sharing capabilities those services offer.
- If you use SharePoint you can benefit from its collaboration and security features. Adding a document initiates any workflow that has been set up in SharePoint, e.g. for approval or feedback.

"I REALLY like Document Management Link! It has HUGE benefit within my little world!"

MARK BINKLEY, DATAQUEST INC., KNOX, INDIANA, USA

## BUSINESS SCENARIO EXAMPLES

- A link to an A/P Invoice can be created at the time of A/P Invoice Entry, and will also be visible from the A/P Vendor Activity and A/P Payment Entry screens.
- A link to a delivery document can be created at the time of O/E Order Entry, and will also be visible from the O/E Shipment Entry and O/E Invoice Entry screens.
- A link to an A/P Invoice can be created in one Sage 300 company, and will appear automatically from within another Sage 300 company, e.g. when used in conjunction with Orchid Inter-Entity Transactions or Inter-Entity Trade.

Documents typically linked to Sage 300 screens using Document Management Link include:

- Purchase Orders; Invoices
- Product Specifications; Contracts; Tenders; Legal documents
- Dispatch & Shipping Advices; Bills of Lading & Air Waybills
- Collection & Delivery documents; Customs, Quarantine and Inspection documents
- Employee Expense claims

"This is way better than having something stuck out on a shared drive, where you can never remember what you called it when the auditors come knocking"

JOSH REEVES, CFO, WALTHER FARMS, THREE RIVERS, MICHIGAN, USA

## MINIMUM REQUIREMENTS

Document Management Link 2018 requires Sage 300 2018 System Manager. Microsoft SharePoint 2010, 2013 or SharePoint for Office 365 (SharePoint.com) is required to take advantage of SharePoint features.

Contact your Sage Software Solution Provider.

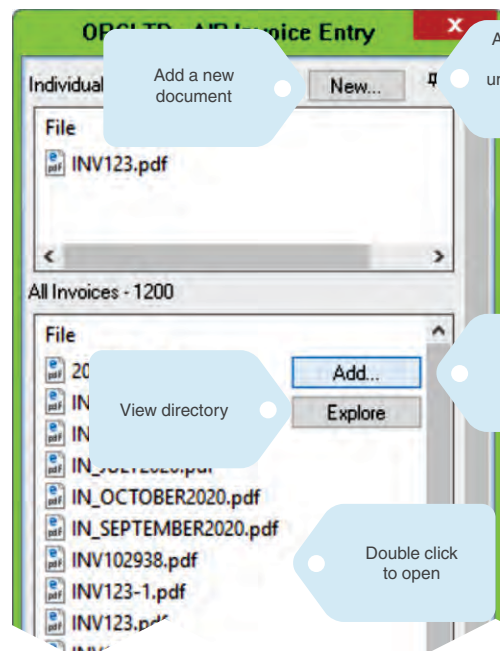
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## FEATURES

- Link to single documents, or related lists - e.g. a specific invoice, or all invoices for vendor Y.
- Link documents to up to two fields - e.g. vendor and document number - to filter selection.
- Link documents to any Sage 300 field (except check-boxes or drop-down selections), including Grid fields.
- Optionally specify which screens will trigger the display of linked documents.
- Links can include sub-directories - e.g. to allow access to archived documents.
- Combine with Orchid Notes to show tailored contextual notes alongside document links.
- Comes with Email SmartLink - easily initiate emails containing hyperlinks to Sage 300 records.
- Operates with all Sage 300 modules - as well as 3rd party modules developed in the SDK.



Your document folder can be mapped to Dropbox, Google Drive, Microsoft OneDrive etc.



## Information Manager Suite

Document Management Link can be purchased on its own, but is distributed as part of Orchid's Information Manager suite of productivity tools. Other Information Manager sub-modules, which require separate licenses, are: Data Views, Report Runner, Optional Tables, Notes, and Email SmartLink.

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