

**Orchid**

# **Training Guide:**



Document Management Link

*Work Smarter with Orchid*

## Information Manager - Overview

Information Manager provides relevant information from Sage 300 when you need it, how you need it and where you need it through a comprehensive suite of modules.

- Document Management Link: allows you to attach multiple files and documents to Sage 300 fields by drag and drop from within Sage 300, saved to either Microsoft SharePoint or an accessible file server. Users can also use Email SmartLink features.
- Notes: Context sensitive pop-up notes from any Sage 300 screen.
- Optional Tables (Previously Supplementary Data): Create your own data structures to store information which is normally held outside of Sage 300. Use the Spreadsheet Add-in to dynamically link spreadsheets to Optional Table - with Read and Write Back capabilities.
- Data Views: Turn Sage 300 's Optional Fields into columns to simplify and accelerate reporting.
- Report Runner: Easy to use, security driven Crystal and General Ledger Financial Report Launcher.

In addition, Information Manager can be used with other Orchid modules to enhance further the business information used in Sage 300.

- Orchid Info-Explorer: Analyze and "slice and dice" your Sage 300 data, identifying trends and drill down into the detail where you need to.
- Process Scheduler: Schedule Cube and Report extracts to optimize system usage.
- Orchid Extender module to generate content to display in Information Manager Notes. (for example Conditional Notes and dynamically retrieve data to display as Notes).

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## Installing Information Manager

This topic applies to all Orchid modules that are part of the Information Manager Suite: Notes, Document Management Link, Report Runner, Optional Tables and Data Views.

The activation code determines what features are available.

### INSTALLATION STEPS

Information Manager is installed by executing the EXE program downloaded for installation. InstallShield will execute and guide you through the installation steps, including whether to install documentation.

#### Before you Start

- Download the program installer for the version of Sage 300 you are running (only available in the Partner area of the Orchid website).
- Before installing Information Manager, ensure that all users have logged out of Sage 300.

#### Installing the files

- Log on to the server where Sage 300 is installed as a user with full administrator rights.
- Run the previously downloaded InstallShield for the module.
- If prompted to re-boot, then do so.

**Tip:**

Programs are installed in the Sage 300 program folder, in the EBXXA subfolder, where EB is the 2-letter code for the Orchid module and XX depends on the Sage 300 version you are running:

Example: EB68A for Information Manager version 2021, EB69A for Version 2022, EB72A for Version 2025.

**Note:** REGACC is run automatically as part of the installation process. If some files are locked during the installation, the re-boot is required to unlock all files and complete the installation.

**Important!** If you install Sage 300 on each workstation, as well as the server, then you must do the same with Information Manager. In this case, repeat the above steps for each workstation.

### ACTIVATE INFORMATION MANAGER

Activate Information Manager in Sage 300 Administrative Services > Data Activation.

**For details** on activating modules, refer to the Sage 300 System Manager online Help (choose the Help menu on the Sage 300 desktop) or review the chapter, *Setting Up Security*, in the *System Manager Administrator Guide*

## LICENSE DETAILS

To start using Information Manager, you need a valid serial number and license file.

If you don't have a valid license for Information Manager, you only see the License screen.

### Enter License Details

The installation doesn't require a serial number anymore. You enter the serial number and activation code in the License screen.

**Note:** This applies to Sage 300 versions 2019 and above. You need a serial number to install an older version.

After you install the software, you need to activate Information Manager in one company using Sage 300 Administrative Services > Data Activation.

There are two options to enter the license details:

#### USE A 30 DAY TRIAL LICENSE FILE

To generate a 30-day trial license file, enter the serial number provided for your module and Save the details.

#### AFTER PURCHASING A SUBSCRIPTION OR A PERPETUAL LICENSE

If you have purchased the module, enter the serial number and activation code provided by your Sage 300 business partner.

**Note:** The license applies to all the Sage 300 databases for the same installation. You only need to enter the license details in one company.

Refer to Information Manager License Screen on the facing page for details on entering Activation Code.

**Tip:** If installing with a 30 day grace period, additional re-installations will not extend the grace period.

## UPGRADING FROM A PRIOR VERSION.

1. Download the new version install program from the Orchid website (Business Partner access only)
2. Obtain the serial number and activation code for the new version
3. Backup your existing database and programs as per Sage Upgrade guidelines
4. Execute the EXE program downloaded (as above for a new install).

5. In Sage 300 / Administrative Services / Data Activation, Activate Information Manager
6. Enter serial number and activation code in the Information Manager License screen. (as above)

## MINIMUM REQUIREMENTS

You need to use the same version for the core Sage 300 modules and Information Manager. For example, Information Manager version 2025 requires Sage 300 System Manager version 2025.

Additional specific Sage 300 modules may be required to enable all functionality. Refer to Orchid Systems's website for details ( <https://www.orchid.systems>).

## Information Manager License Screen

To start using Information Manager, you need a valid serial number and license file.

If you don't have a valid license for Information Manager, you only see the License screen.

### Note:

If you have activated Information Manager without a serial number and activation code in a database where Extender is activated with a valid license code, you also have access to I/M Options, where you can configure the tray to display Extender Log and Workflow icons.

For details, refer to Extender Workflow- Notes/DML/Extender Tray

## LICENSE SCREEN

You use the Information Manager license screen to enter serial number and activation code.

### When to use:

- After a new installation or an upgrade to a newer version of Sage 300.
- After a subscription renewal, enter the activation code with the new expiry date.
- View the components of the Orchid module you are licensed for.

### How to use:

- Enter the license details, click the **Add** button to create the license file.
- Restart the Sage desktop to enable the new license.

**Note:** If you have multiple Sage 300 databases, you only need to enter the activation code details in one company. When the licence details are entered on the first company, Information Manager creates the EBXXA.lic file, which can then be read by all other companies configured on the same server.

## DML Users

If you are using Document Management Link, you can view the Sage 300 users logged on and configured as a "DML User". You cannot setup users from this screen.

To setup a DML User, refer to Configure Tray for DML User

## 30-day Trial Licence

If you don't have an activation code for Information Manager, you can create a 30-day trial license.

In the License screen, enter a serial number for the module, Sage 300 version and edition you are running.

Click the Add button. This create a 30-day trial license.

**Tip:** If you install a 30-day trial, enter a valid activation code before the trial expiry date to continue using the application.

**CLICK AND EXPAND FOR AN EXAMPLE SCREENSHOT**



The screenshot shows the 'ORCEFT - Information Manager Licen...' window. It has a menu bar with 'File' and 'Help'. The form contains the following fields:

- Company: Orchid Business Systems
- Serial Number: 1969193-00012
- Activation Code: (empty)
- Expiry Date: 10/21/2028

Below the fields, it states: 'Licensed for: Optional Tables, Notes, Database Views, Report Planner, DML' and 'You have 10 DML User licenses'. There is a table with the header 'User' and 10 empty rows. At the bottom are 'Save' and 'Close' buttons.

An orange callout bubble points to the 'Serial Number' field with the text: 'Enter the Information Manager Serial Number and click Save for a 30-day trial'. An orange arrow points from the callout bubble to the 'Save' button.

## Subscription Licenses Expiry Date

You can check the subscription expiry date and enter a new activation code after a subscription renewal is processed.

Subscription licenses have an expiry date. To continue using Information Manager, you will need to renew the subscription and enter a new Activation code in the module License screen before the expiry date.

Contact your Sage 300 Business Partner for details.

**Note:** In the four weeks before the expiry date, users receive a warning message when logging into Sage 300 (weekly for the first three weeks and daily in the last week). If you don't renew before the expiry date, the software will become read-only.

## TROUBLESHOOTING ACTIVATION CODE

When saving the license information, the following problems may be encountered:

**Activation code Invalid** – verify the registered company name (displayed during installation) and serial number entered match the details supplied to Orchid Systems when an activation code was requested.

**Invalid serial number** – the entered serial number is not valid for this product, Sage 300 version and edition.

**Important!** If the Sage 300 Version or Edition change, a new Serial Number and activation code must be requested from Orchid Systems.

If the company name registered with Sage changes, a new Activation Code must be requested from Orchid Systems.

Refer to detailed troubleshooting tips in Troubleshooting Activation Code,

## ACTIVATION CODE AND AVAILABLE FUNCTIONALITY

Depending on the components you are licensed to use, some features described here may not be available for you to use. Some functionality of Information Manager is only active if you have purchased the required module component.

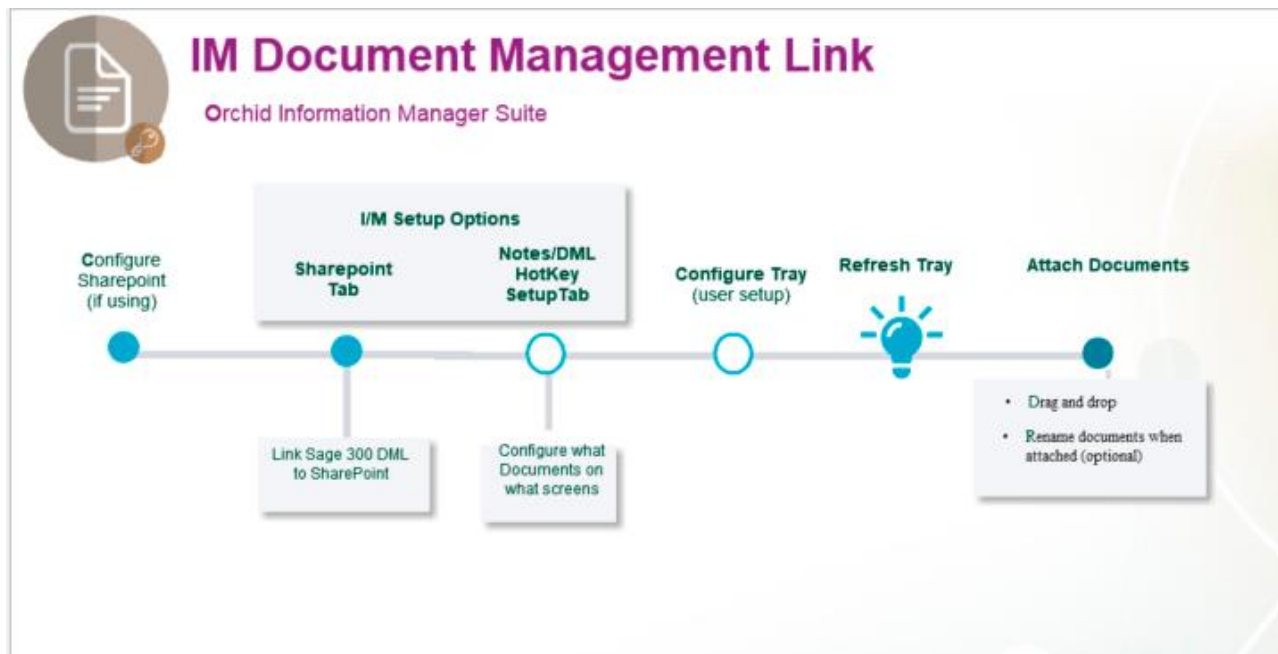
The license screen displays what components of the Information Manager module are included in the activation code.

# Setup Document Management Link

## KEY STEPS

- Confirm where you are going to save the documents (Network Folder, including synchronised Dropbox, Google Drive, OneDrive folders, or SharePoint).
- If using SharePoint:
  - Confirm SharePoint Server name, Site and Version as well as Logon details
  - Add fields to SharePoint folders to store DML related details.
  - For a detailed example, refer to Setup Document Management Link with SharePoint for Office 365 on page 28
- Identify the Screen ID and the field labels in Sage
- Confirm which users will use Document Management Link.
- Configure DML in I/M Options > Notes/DML/Extender Setup, save and Refresh the tray icon
- Test

The setup steps are described in the Visual Process Flow (VPF) below followed by detailed steps. To assign VPF, see Assigning Visual Process Flows



## STEP 1. CONFIGURE SHAREPOINT IF USING IT TO STORE DOCUMENTS

- Logon to SharePoint to check details and security and create required fields. Refer to Setup Document Management Link with SharePoint for Office 365 on page 28
- Use I/M Setup\ Options on the **SharePoint tab** to define the version of SharePoint you are using, together with the SharePoint server and site details.

The screenshot shows a window titled "ORCLTD - I/M Options" with a green title bar. It has a menu bar with "File" and "Help". Below the menu bar is a tabbed interface with tabs: "Contact", "Notes/DML Hotkey", "Note Categories", "Report Runner", "E-mail", "Suppl. Data", "Sharepoint", and "Updates". The "Sharepoint" tab is selected. Inside the tab, there are three input fields: "Server" with the value "https://orchidsystems.sharepoint.com", "Site" with the value "/sites/Sage300Doc", and "Version" with a dropdown menu showing "Sharepoint.com". At the bottom of the window are "Save" and "Close" buttons.

## STEP 2. USE I/M SETUP>OPTIONS>NOTES/DML/EXTENDER TRAY TAB:

- Automatically Start the Notes/DML Tray- Generally leave set to "Yes"
- Configure which Sage 300 Fields/Screens display documents
  - Note Type = Network Folder or SharePoint if using SharePoint
  - Enter up to 2 field labels found on the Sage 300 screens
  - Select the folder where documents are stored
  - Optionally, you can choose to show documents only on certain screens (RotoID).
  - If required, configure how to rename files when they are added to the Alert Box

**Tip:** Use the F9 / Detail screen to setup the configuration as this will show you the required fields for each Note type.

**Detailed Field Description**

Network Folder Configuration - Setup Notes/DML/Extender Tray Tab on the next page  
Notification and Alert Configuration (Notes/DML/Extender Tray Tab)

**Detailed Field Description if using SharePoint**

Notes/DML/Extender Tray Tab - SharePoint Configuration on page 39  
Notification and Alert Configuration (Notes/DML/Extender Tray Tab)

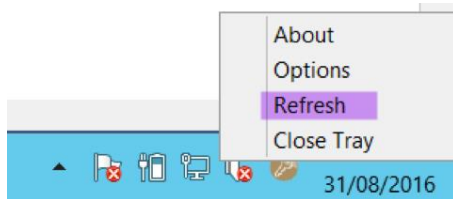
## STEP 3. CONFIGURE TRAY ICON / ALERT BOX FOR USERS

- Select DML User for all users who need access to documents.
- If using SharePoint, enter the SharePoint logon details.

The screenshot shows a window titled 'Information Ma...' with a menu bar containing 'File' and 'Help'. The main area has a 'DML User' checkbox which is checked. Below it is a 'Sharepoint' section with 'User' (nathalie@orchid.systems) and 'Password' (masked with asterisks) fields. Further down is a 'Hotkey' field set to 'F11'. Below that is a 'Last field' section with 'Roto ID' and 'Field Name' (Vendor Number \*) fields. At the bottom are 'Save' and 'Cancel' buttons.

For more details, Configure Tray for DML User

Refresh the Tray icon if you have made any changes on the IM Setup>Options in the current session as the Tray icon reads the current setup when the company is first opened.



**Tip:** If you have multiple Tray icons, Close the Sage 300 desktop and re-open to refresh the configuration.

**Important!** Security is configured through users' access to the folders that are configured in DML. So there is no DML specific security configuration.

## NETWORK FOLDER CONFIGURATION - SETUP NOTES/DML/EXTENDER TRAY TAB

Add a row in the grid for all required configuration.

**Tip:** Use the F9 / Detail screen to setup the configuration as this will show you the required fields for each Note type.

### Select **Network Folder** Note Type

Note Type = Network Folder

For further details on note type, view below

### Configure how the documents are linked to Sage 300

Documents are linked to Sage 300 screens based on up to 2 field labels.

Optionally, you can choose to rename files and/or to show documents only on certain screens.

#### **ROTOID**

##### Rotoid - unique id for each screen - Optional

Rotoid is the Sage 300 unique screen ID for the Desktop screen. You only need to enter it if you want to restrict the Document/Notes to one particular Sage 300 Screen.

Leave the Rotoid field blank If you want the note / Document to trigger for all Sage 300 forms which have the Field label specified. The alert will show as per its configuration.

**Example:** For example, if you want Vendor Invoices only to show on the Vendor Activity screen, you would fill in the RotoID of AP1500.

For details on finding the RotoID, refer to How to find the RotoID of a Sage 300 screen

## **FIELD LABEL**

Enter the field label from the Sage 300 screen which is to trigger the display of the Documents icons.

If the Field Label is entered with quotes, e.g. "PY", Information Manager will use the hard coded value in addition to the value set in the Second Field Label.

### **Important!**

1. The same field may have different labels on different screens. See Example 1 below
2. The same field label may be used on the Header and Grid component of the same screen. See Example 2 below. Adding "F." to the field label forces it to use the field control and "G." forces it to use the grid control.

### **Examples:**

1. In AR Receipt Entry there are two Document Number fields - one on the header and one in the grid. To force the tray to use the correct one, you should use "F.DOCUMENT NUMBER" for the screen label or "G.DOCUMENT NUMBER" for the grid field label. .
2. If you want the same list of documents to show on both the AR Customer Screen and the AR Customer Inquiry, you need to add two rows in the IM Setup\Options on the Notes/DML/Extender Tray tab. One for the Field Label "CUSTOMER NUMBER" and one for the Field Label "CUSTOMER NO."

## **SECOND FIELD LABEL**

Enter the second field label from the Sage 300 screen which is to trigger the display of the Documents icons. If entered, then the document list will displayed for Field 1 = Field label and Field 2 = Second Field Label.

Second Field Label is optional and is configured in the same manner as the Field Label.

## **FOLDER**

Fill in the Network Folder where the documents will be stored for this Field Label. (applies to Network Folder Type only).

**Tip:** Use Domain security profile to ensure users have appropriate rights to add / view /delete files in the folder.

**Note:** Use UNC path instead of mapped drive as all users may not have the same mapped drives.

## Using {value} and {value2} in the folder name

You can optionally use {value} and /or {value2} in the folder name, where {value} is the first field value (as configured in Field label above) and {value2} is the Second Field label configured.

DML will automatically create the folders for {value}/{value2} as required when you add documents.

### **Example:** Using {value}

Set folder to \\vendordocuments\{value}\{value2}\*.\*

On the AP Invoice screen, for vendor 1200 and document DOC001, documents are attached to a folder per vendor and you will see all documents starting with DOC001 (any extension and any other characters after the Invoice number) in a folder per vendor 1200

\\vendordocuments\1200\DOC001\*.\*

## Using wild cards (\* and ?)

You can use wild cards to define which files you want to see.

\* represents any number of characters, ? represents one character.

## Using ORGID and date in the folder configuration

Folder can include variables based on the Sage 300 database ID and the date the document is attached.

{orgid} = Sage 300 database ID

{yyyy} is the system year

{yy} is the two digit year (e.g. 2021 = 21)

{mmm} is the 3 character month, e.g. "Mar"

{mm} = two digit month, e.g. March = 03

{dd} is the two digit day

{d} is the day without a leading zero

**Note:** All the above variables are case insensitive.

For special month formatting, you can use the Case-Sensitive values below:

{M} = month name, e.g. "March"

{m} = month without a leading zero, e.g. March = 3



**Example:** Using {ORGID}

Set folder to \\vendordocuments\{orgid}\{value}\{value2}\*.\*

Logged into SAMINC, you will see all documents \\vendordocuments\SAMINC\1200\DOC001\*.\*

Logged into SAMLTD, the documents will be attached to \\vendordocuments\SAMLTD\1200\DOC001\*.\*

**SHOW FOLDER**

Option to Enable or Disable the display of folders under the configured DML network folder.

Choose Show Folder if you want to archive documents in a folder, but need users to access such documents occasionally.

**Example:** This is useful if you file documents by year for example. By default you see all documents in the main folder, but you still have easy access to folders for prior years.

**RENAME FILE TO**

You can optionally automatically rename the file when it is copied or dragged into the network folder and the value given here will be the file name. Wild cards \* and ? may be used.

Rename settings need to be consistent with the Folder settings if you filter based on the document name.

**Example:** EG '{value}\*' would prefix the file name with the field {value}. So dragging in a Word document called contract.doc would be renamed 1200contract.doc if {value} was Customer number and the customer on the screen was Customer 1200.

**Example:** EG '{value2}.\*' would rename the file with the contents of {value2}. So dragging in an Excel document called invoice.xls would be renamed INV123.xls if {value2} was Document Number and the document number on the screen was INV123.

**Example:** EG 'contract.\*' would rename the file with the letters 'contract'. So dragging in a PDF document scan20121201.pdf would be renamed contract.pdf

## Configure the Alert Box.

The most common setup for Notes and Documents is

Notification Method = None and

Show Alert = Show Alert.

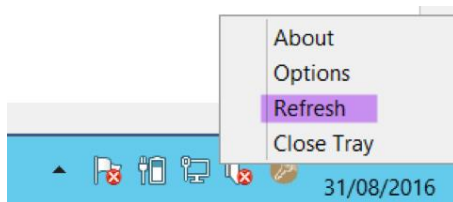
In Alert Heading: Enter a description for the section in the Alert Box

## Document Management Link

Notification Method (Icon in System Tray)	None
Show Alert Box	Show alert
Heading	Customer Invoices

For details on all configuration options, refer to: Notification and Alert Configuration (Notes/DML/Extender Tray Tab)

Refresh the Tray icon if you have made any changes on the IM Setup>Options in the current session as the Tray icon reads the current setup when the company is first opened.



**Tip:** If you have multiple Tray icons, Close the Sage 300 desktop and re-open to refresh the configuration.

## SETUP DML (NETWORK FOLDER) FOR OE SCREENS.

A Sage 300 user needs to store documents in a network folder and display Order Confirmation, Invoices and Contracts for each customer.

**Example:** 1- Contracts with clients stored in a folder per customer, with sub-folders to track prior contracts. All documents displayed when using OE screens, documents renamed sequentially.

**Example:** 2- Display OE Order confirmation on OE Order Screen only- Order Confirmation PDF files are saved in a single folder called "Order Confirmation". (for example created by a custom program)

**Example:** 3- OE Invoice documents are stored in a folder by Customer, All Invoices can be viewed when looking at a customer activity screen. When viewing an OE Invoice or Order screen, single invoice is displayed

## KEY STEPS

### 1. Determine where the documents will be stored and in what folder structure. Consider the Document Management Process

Documents can be viewed in DML if generated / saved in the appropriate folder manually or can be dragged into the correct folder when viewing a Sage 300 document.

Options include: A folder per document type where file name matches the Sage 300 document number, A folder per customer / Order number combination, or a folder per customer only and filter based on the document number.

In some cases, for example where a custom program generates the OE PDF Files and names the files following a standard convention, you may have all Order confirmation in a single folder and use DML to display the appropriate document against the Order / Invoice as required.

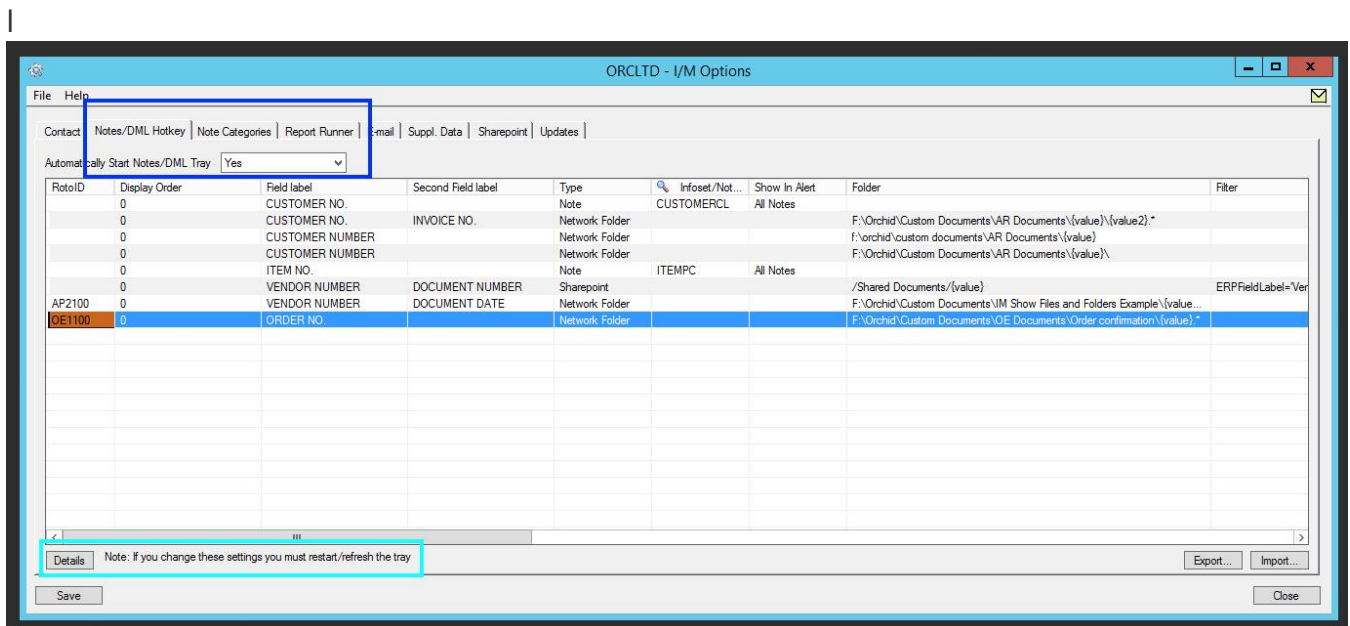
### 2. Define what screens / fields in Sage 300 will launch Document Management Link (I/M Options - Notes/DML/Extender Tray Tab)

- a. Automatically Start the Notes/DML Configure Tray Icon to display Notes and Documents
- b. Add a detail line for "Network Folder" to configure which Sage 300 Fields/Screens display document lists - See Examples below.

**Tip:**

Use the F9 / Detail screen to setup Notes Hotkeys as this will show you the required fields for each Notes type. For Documents, the key elements to configure are the Field labels and the folder fields.

- In most cases you would set Notification Method = 'None' and Show Alert = "Show Alert" to display the Alert Box on all screens that have DML configured.
- Select a meaningful heading to distinguish the various document types, in particular if some screens have multiple document types.



## EXAMPLE 1 - DISPLAY CONTRACT DOCUMENTS FOR CUSTOMERS, STORED IN A FOLDER PER CUSTOMER.

Configure DML to create a folder per customer to store customer contract documents. Files should be named consistently "ContractCustNo.pdf" and prior version to be stored and visible in DML.

For example contract documents can be dragged into DML from a folder storing all scanned documents and renamed on the fly, or documents could be saved directly into the customer folder with the customer name and viewed in DML.

AR Customer with Customer Contracts

The screenshot displays the 'ORCDML - A/R Customers' application window. The main form contains the following fields and values:

- Customer Number: 1200 (marked as Required)
- Customer Name: Mr. Ronald Black
- Address: 2820 Wabash Road
- City: Los Angeles, State/Prov.: CA, Zip/Postal Code: 90048
- Country: USA, Telephone: (213) 555-0274, Fax: (213) 555-7234
- Group Code: RTL, Retail Sales Group
- Last Maintained: 22/09/2016, Start Date: 01/01/2009, Territory: CA

The right-hand pane shows two file lists:

- Customer Contracts - 1200**: Contract1200.txt
- All Customer Documents - 1200**: 1200.pdf, IN00000000000002.txt, IN00000000000004.txt

Screen of DML setup - CUSTOMER NUMBER, folder {value} and RENAME

Configure label "Customer Number." to show all documents in the folder using the customer number in the directory name. Needed to show the documents against the customer in AR.

**Tip:** If you want to show the same documents in OE, Configure label "Customer No." to show all documents in the folder using the customer number in the directory name. This is because the same field may have a different label on different Sage 300 screens.  
insert screenshot of setup.

The screenshot shows a 'Details' dialog box with the following fields and values:

- Line Number: 3
- Type: Network Folder
- RotoID: (empty)
- Field label - {value}: CUSTOMER NUMBER
- Second Field label - {value2}: (empty)
- Folder: F:\orchid\custom documents\AR Documents\{value}
- Show folders: Files Only
- Rename File To: (empty)
- Notification Method: None
- Show alert: Show alert
- Heading: Customer Contracts

Buttons at the bottom: Save, Delete, Close.

CUSTOMER NUMBER	Network Folder
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**Important!**

The same field label may be used on the Header and Grid component of the same screen. Adding "F." to the field label forces it to use the field control and "G." forces it to use the grid control. (Example the DOCUMENT NUMBER field on the AR Receipt Entry Screen).

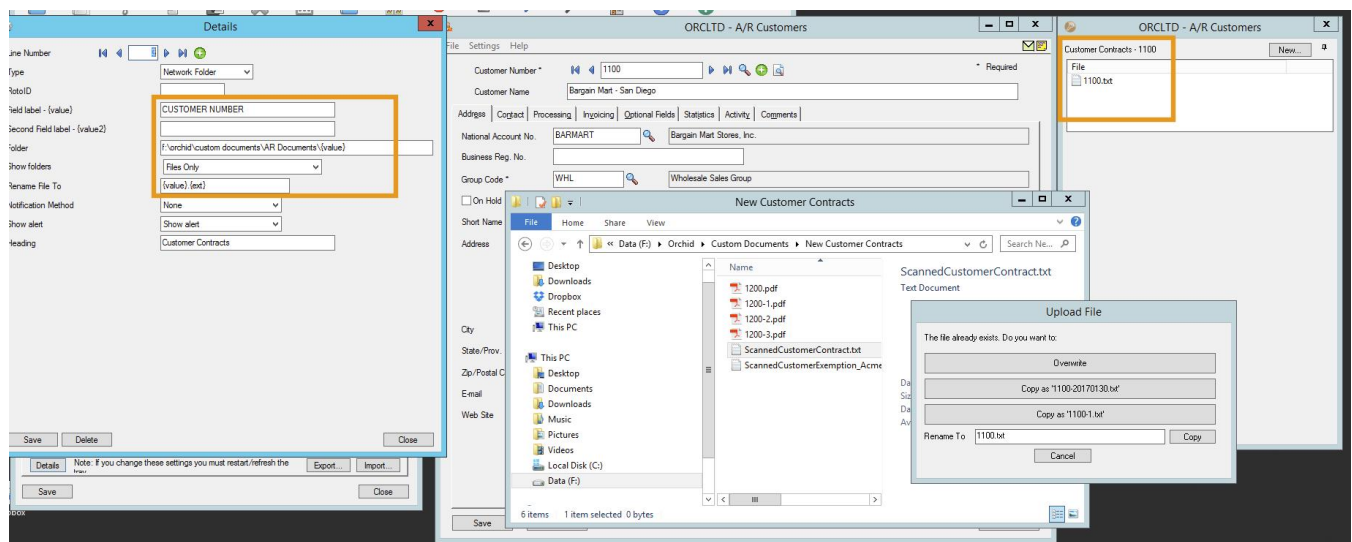
## Renaming Files.

You can enforce consistent naming of the documents by letting DML rename the files {value}.{ext} will rename the files based on the customer number and keep the extension of the original document.

**Tip:** You could rename 'contract.\*' would rename the file with the letters 'contract'. So dragging in a PDF document scan20121201.pdf would be renamed contract.pdf

If you drag another document for the same customer, you will be prompted to overwrite or set the name based on the current date or add a sequence to make the filename unique.

Screenshot of RENAME only.



## EXAMPLE 2 - DISPLAY ORDER CONFIRMATION ON OE ORDER SCREEN

OE Order Screen displays documents stored in an "Order Confirmation" folder. DML filters the relevant document based on the document name and the Order Number.

Files are only displayed on the OE Order Entry screen.

## Document Management Link

ORCLTD - O/E Order Entry

File Settings Help

Order No.

No. of Shipments

Last Shipment No.

Customer No.

Mr. Ronald Black

Last Invoice No.

Order Customer Taxes Optional Fields Sales Split Rates Totals

Template Code

PO No.

Status: Posted

Entered By: ADMIN

Order Date

☐ On Hold

Order Type

☐ From Multiple Quotes

☐ Job Related

☐ Project Invoicing

☐ Retainage

Ship-To Location

Location

Central warehouse - Seattle

Deliver By

Exp. Ship Date

☒ Calc. Tax

Ship Via

Cross-Country Trucking Lines

Tracking No.

Description

Reference

Lin...	Type	Item No. / Misc. Charge	Kit/BOM	Description	Price List	Location	Deliver By	Exp. Ship Date
1	Item	A1-103/0		Fluorescent Des...	USA	1	4/04/2016	4/04/2016
2	Item	A1-105/0		13W Mini Fluore...	USA	1	4/04/2016	4/04/2016

Qty. on Hand

Qty. on Sales Order

Qty. on Purchase Order

Qty. Committed

Qty. Available

	Qty. on Hand	Qty. on Sales Order	Qty. on Purchase Order	Qty. Committed	Qty. Available
Location 1 (Ea.)	267	20	250	0	267
All Locations (Ea.)	1,287	39	426	0	1,287

Item/Tax...

Components...

Ship All

Order Subtotal

370.95

USD

Post

Create PO

Delete

History...

Prepayment...

Close

ORCLTD - O/E Order Entry

Customer No. - 1200

New...

The credit limit for customer 1200 Mr. Ronald Black has changed from 20000.000 to 30000.000.

This change was done by ADMIN by doing an Update on the customer record.

Date : 22/09/2016

Time : 15:55:52

Order Confirmation - ORD000000000069

File

ORD000000000069.pdf

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Setup Document Management Link



The 'Details' dialog box contains the following fields and controls:

- Line Number:** A numeric input field with the value '6' and navigation buttons (back, forward, and a green plus button).
- Type:** A dropdown menu set to 'Network Folder'.
- RotolD:** A text input field containing 'OE1100'.
- Field label - {value}:** A text input field containing 'ORDER NO.'.
- Second Field label - {value2}:** An empty text input field.
- Folder:** A text input field containing the path 'F:\Orchid\Custom Documents\OE Documents\Order confirmation\{value}.\*'.
- Show folders:** A dropdown menu set to 'Files Only'.
- Rename File To:** An empty text input field.
- Notification Method:** A dropdown menu set to 'None'.
- Show alert:** A dropdown menu set to 'Show alert'.
- Heading:** A text input field containing 'Order Confirmation'.

At the bottom of the dialog are three buttons: 'Save', 'Delete', and 'Close'.

- This setup will only display files named with the Order Number (any extension). This assumes that the files will be saved (manually or automatically) in the given folder with the Order Number as the file name as no renaming is configured.
- Type OE1100 in the RotolD to show the documents only on the Sage 300 Order Entry Screen.

**Note:** (You can get the unique identifier of the Sage 300 screen on the Sage 300 Desktop or you can use the Tray hotkey to find the Rotold of the screen.)

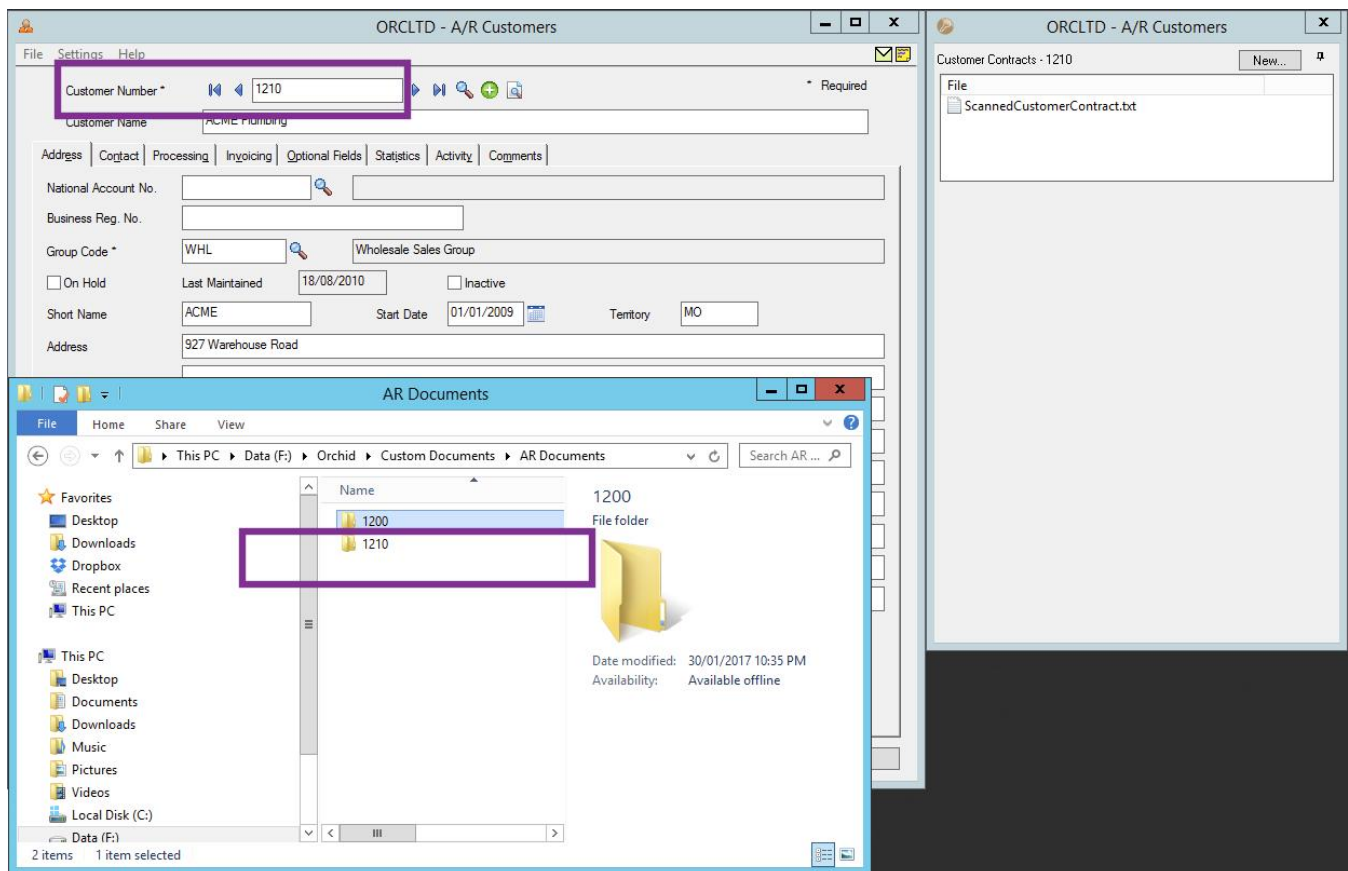
**Tip:** This is a useful scenario when the PDF are generated through a custom program and saved in a folder on posting of the Order. Similar scenario can be used for OE Invoices.

## EXAMPLE 3 - DISPLAY INVOICES IN A SEPARATE FOLDER BY CUSTOMER

All Invoices displayed when looking at a customer in A/R, Only the relevant invoice showing on the OE Invoice screen.

When all documents are in a single folder for the customer, you can also add a Hotkey configuration to show all documents on the customer screen (label CUSTOMER NUMBER) and filter by RotoID to display only on AR Customer or AR Customer Activity, but not on all finders.

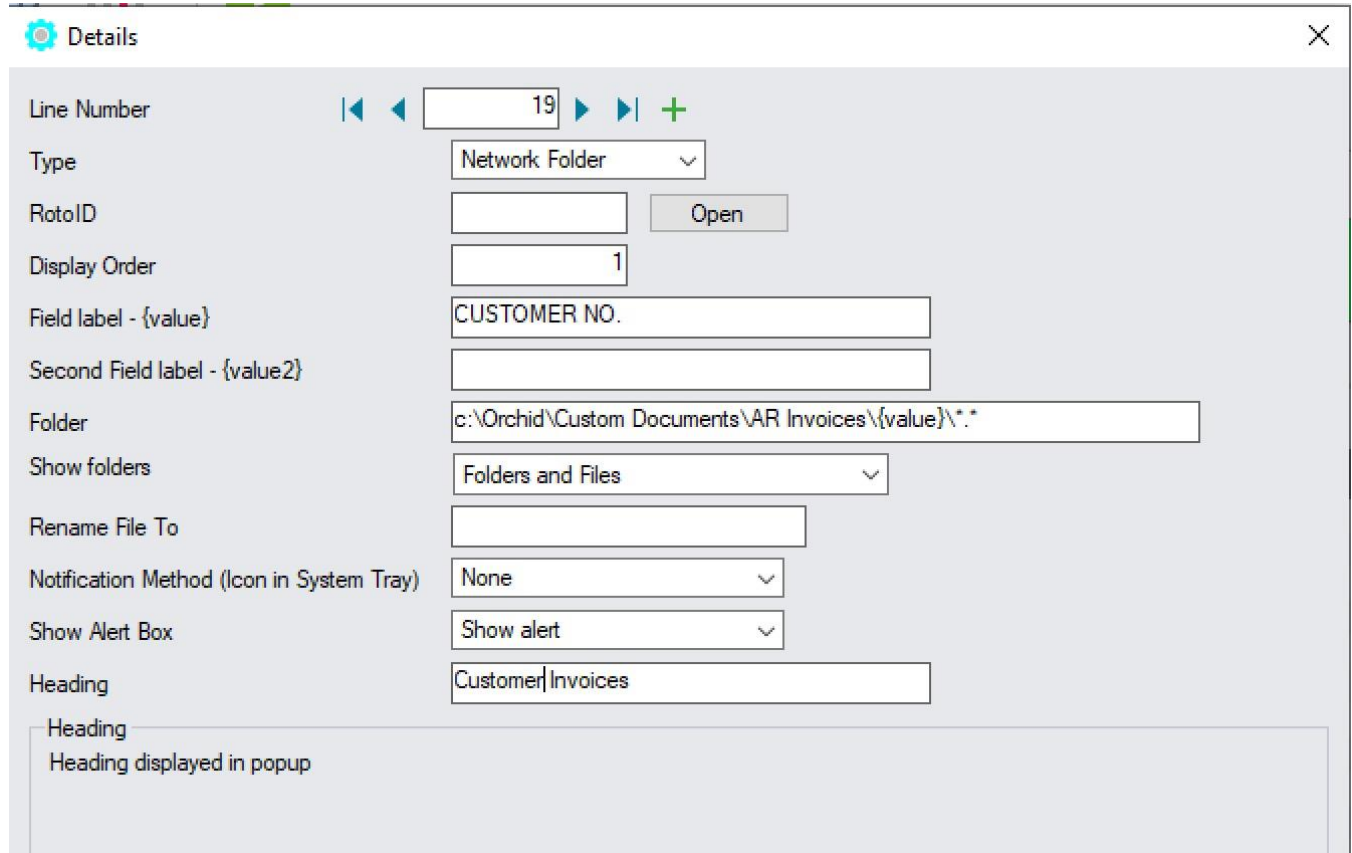
**Tip:** View article in our knowledge base to add a hyperlink to the saved Invoice from an AR Trial balance or a custom Crystal report.



**Folder path**

{value}\\*.\*:this puts all documents in a single folder per customer.

This will display all customer documents.

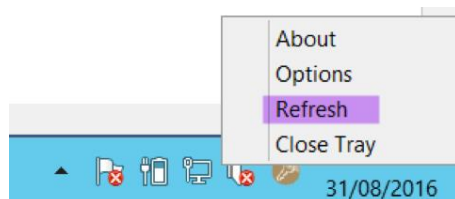


The screenshot shows a 'Details' configuration window with the following fields and values:

- Line Number: 19
- Type: Network Folder
- RotolD: (empty)
- Display Order: 1
- Field label - {value}: CUSTOMER NO.
- Second Field label - {value2}: (empty)
- Folder: c:\Orchid\Custom Documents\AR Invoices\{value}\\*.\*
- Show folders: Folders and Files
- Rename File To: (empty)
- Notification Method (Icon in System Tray): None
- Show Alert Box: Show alert
- Heading: Customer Invoices
- Heading displayed in popup: (empty)

### 3. TRAY ICON CONFIGURATION

Refresh the Tray icon if you have made any changes on the IM Setup>Options in the current session as the Tray icon reads the current setup when the company is first opened.



**Tip:** If you have multiple Tray icons, Close the Sage 300 desktop and re-open to refresh the configuration.

## 4. CONFIGURE ALERT BOX FOR USERS WHO REQUIRE ACCESS TO DML

- Tick DML User for all users who need access to documents. DML Licensing is concurrent users. If more users are configured as "Orchid users" than included in the Information Manager Activation code, the first users who log on to Sage 300 have access to the functionality. Additional users may receive a message about "insufficient licences".

**Important!** Security is configured through users' access to the folders that are configured in DML. So there is no DML specific security configuration.

## OPTIONS FORM - SHAREPOINT TAB

Use this tab to Setup your SharePoint server details for use in Document Management Link.

- Server - the SharePoint Server name or IP address, including the port
- Site - the appropriate SharePoint site name on the SharePoint Server
- Version – Select the appropriate SharePoint version

Next steps: Notes/DML/Extender Tray Tab - SharePoint Configuration on page 39

- Options Form - SharePoint Tab above

## SETUP DOCUMENT MANAGEMENT LINK WITH SHAREPOINT FOR OFFICE 365

If you are not using SharePoint to store documents, refer to Setup Document Management Link on page 11.

Orchid Document Management Link (DML) has included integration with Sharepoint.com since 2014. As more and more customers use Office 365, we have documented the key steps to get DML integrated with SharePoint for Office 365.

### About this example

We will setup SharePoint and DML to store all A/P Vendor documents, in a folder per Vendor, within a SharePoint library called "Sage300DML".

When viewing a Vendor screen, all documents for that Vendor will be displayed.

When looking at a specific AP Invoice in Sage 300, only documents in the Vendor folder that are tagged with that Invoice Number will be displayed.

**Tip:** Documents uploaded directly to the SharePoint library will also be displayed by DML, if the metadata tag properties have been updated as per the DML configuration.

## Step 1. Log into your SharePoint site

### Confirm site details if you want to use an existing SharePoint site

If you already have a SharePoint site,, navigate to the Document Library list where you want to store the Sage 300 documents.

Hover over any one document to get

- a. SharePoint server name: `mycompanyname.sharepoint.com`
- b. SharePoint site name: `MSTeamTest`
- c. Document folder: `Shared%20Documents` or `Shared Documents`

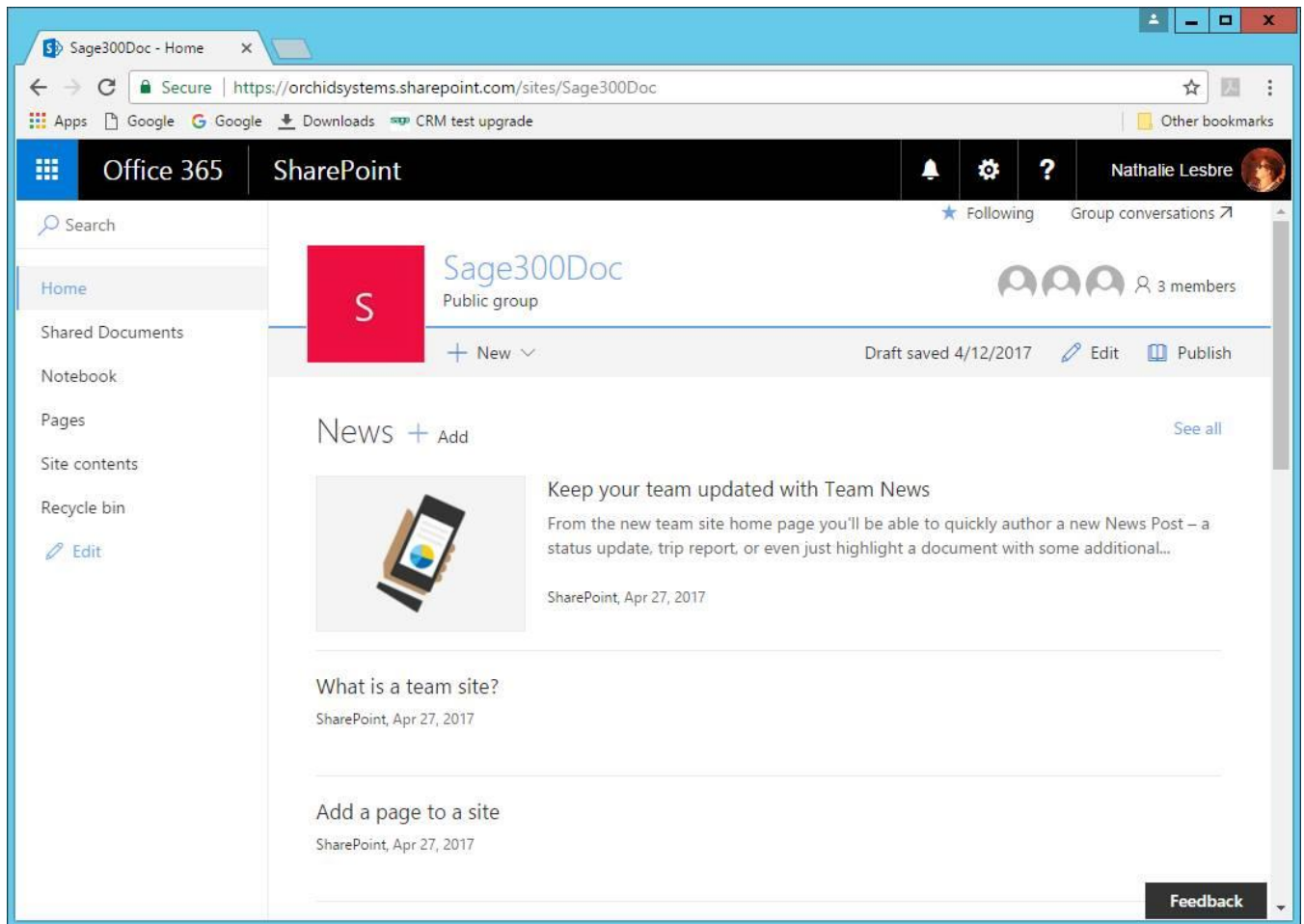


`https://[redacted].sharepoint.com/sites/MSTeamTest/Shared%20Documents/Forms/AllItems.aspx`

### Create a site to store documents relating to Sage 300

If you don't have a site, you can create a new site. It can be an Organisation site or a Team site.

Document Management Link uses SharePoint security. You need to ensure the users have the appropriate rights in SharePoint.



## Add a Document Library and folders to the site

In the example below, we have created a Document Library called Sage300DML.

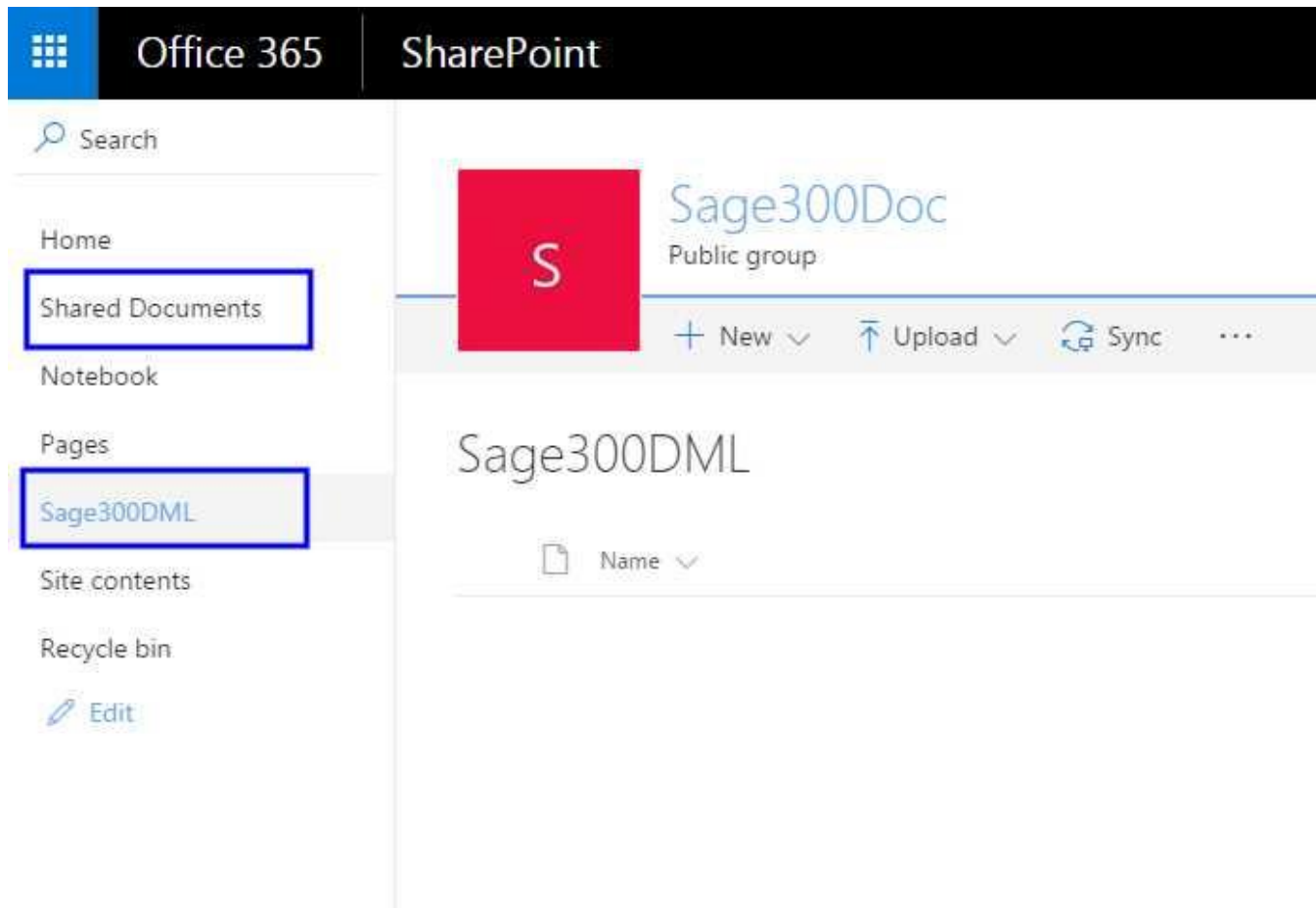
You can also create folders for different types of documents, for example AP documents and AR documents.

You don't need to create sub-folders per vendor or customer, Document Management Link creates the folders when you upload the documents from Sage 300.

### Note:

You can use the default Shared Documents library. However, in some cases the name you see as "Shared Documents" is not the same as the path name and can cause connection issues. You may need to use "Shared%20Documents" in the I/M Options > DML Setup

It is recommended to create a new folder or library to store DML documents.



## Add columns to SharePoint Library to store DML references

The new columns will store the link between the SharePoint Document and Sage 300 Document Management Link. They are used in the Notes/DML/Extender Tray Setup - you can call them what you want. In this example, we have created: DMLFieldLabel, DMLFieldValue, DMLFieldLabel2, DMLFieldValue2 and DMLSageRotolD.

You need 3 fields if you link documents to one Sage 300 field, 5 fields if you link documents to two Sage 300 fields.

**Note:** SharePoint paths and field labels are case sensitive.

## Example with AR Customer

You want to configure DML to show AR Customer documents for the AR Customer Activity screen.

- DMLFieldLabel: the type of document link you are using, is filled with the Sage 300 field label when attaching documents
- DMLFieldValue: The Sage 300 key value this document is linked to.



- DMLSageRotoID: The Sage 300 screen which was active when this document was uploaded to SharePoint from the DML Tray.

**Example:**

The SharePoint field `DMLFieldLabel1` is updated with 'CUSTOMER NUMBER' as the link is from the AR Customer Activity Screen, via the customer number field and `DMLFieldValue` is updated with the customer number , e.g. 1200 for Customer 1200 / Mr Ronald Black.

`DMLSageRotoID` in the example above, which is updated with 'AR1300' when dragging in a document with the Sage 300 AR Customer Activity screen open

## Example with AP Vendor and AP Document

- `DMLFieldLabel`: the type of document link you are using , is filled with the Sage 300 field label when attaching documents
- `DMLFieldValue`: The Sage 300 key value this document is linked to.
- `DMLSageRotoID`: The Sage 300 screen which was active when this document was uploaded to SharePoint from the DML Tray.
- `DMLFieldLabel2`: the second field label you want to link documents to
- `DMLFieldValue2`: the value of the second field the document is linked to

**Example:**

DML configured to show A/P invoice documents on the A/P Invoice entry screen. The link is from the AP Invoice Entry screen, via the Vendor Number and Document Number fields.

The SharePoint fields are updated as follows:

`DMLFieldLabel1` is updated with 'Vendor Number'

`DMLFieldValue` is updated with the actual Vendor customer number , e.g. 1200 for Vendor 1200 /Chloride

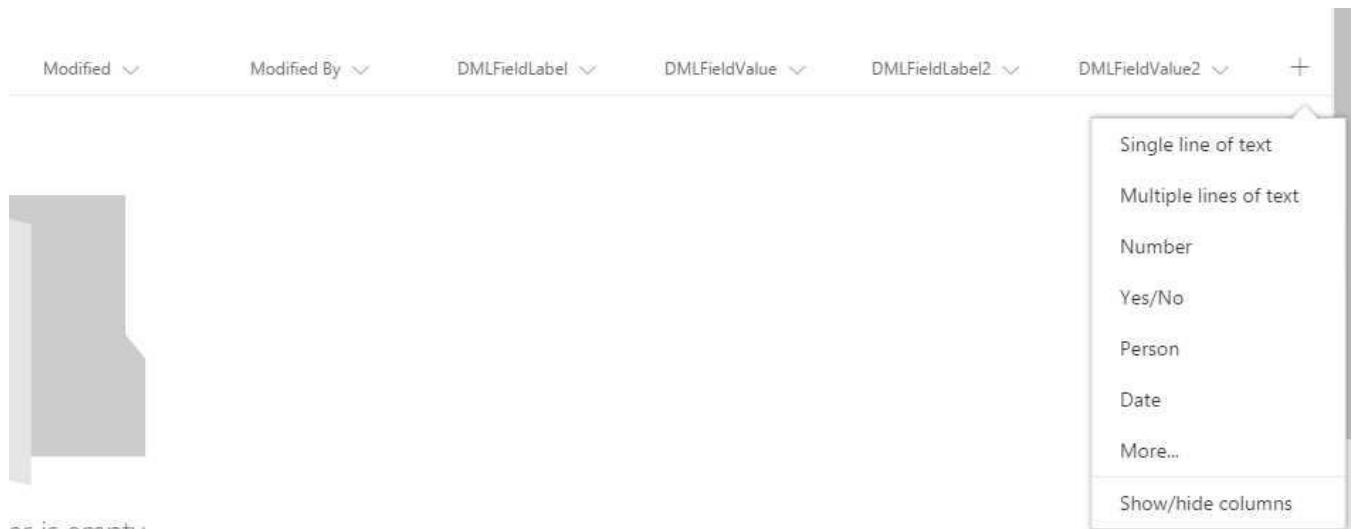
`DMLFieldLabel2` is updated with 'Document Number'

`DMLFieldValue2` is updated with the actual document / Invoice number , e.g. INV9088

`DMLSageRotoID` in the example above, which is updated with 'AP2100' when dragging in a document with the Sage 300 A/P Invoice entry screen

Screenshots show SharePoint configuration and corresponding configuration in Sage 300 I/M Options. The column names added in SharePoint are used in the I/M Options configuration.





## SharePoint Security

You need to give the users the required SharePoint security first. IE if they cannot view the documents in SharePoint, they will not see them in DML. If they do not have security to add in SharePoint, when they drag and drop into DML – they will get an error message.

## Step 2. Configure SharePoint Credentials

### Use the Information Manager Tray

to configure SharePoint credentials.

For details on configuring Information Manager Tray, refer to Configure Tray for DML User

- Right-click and choose Options.
- Enter your SharePoint Username and Password;
- Save the Tray settings
- Refresh the Tray.

## Using SharePoint with Multi-Factor Authentication

If Multi-factor authentication (MFA) is enabled for the user, you need to create an APP Password for the DML Integration and use those credentials as described below.

Although Orchid modules don't support 2-step authentication directly, you don't need to turn off MFA to use DML with SharePoint integration. If you enable MFA, you can use it for all applications that support it. To use Office 365 to email from Orchid modules and to use Document Management Link and SharePoint integration, users need to create an APP password for use in the Orchid module, as supported by Microsoft. For details, refer to the topic below Using Orchid Modules with Office365 and Multi-Factor Authentication and App Passwords

## Legacy Authentication

If you are using MFA and App password in Office 365, but are still receiving errors when testing the SharePoint integration, ensure that Legacy Authentication is not blocked. Refer to Office365 and Legacy Authentication.

### Step 3. I/M Setup - Options - SharePoint Tab

The SharePoint site details must be entered in the I/M Options >SharePoint tab.

**SharePoint server name** : enter the details of the server name. For Office 365, use `https://sample-company.sharepoint.com`

**SharePoint site name** : Enter the site name, including the folder you want to save the documents into.

**Example:** `/sites/Sage300Doc` - This assumes you have created a SharePoint site called Sage300Doc

**Example:** `/sites/MSTeamTest`- This example is when using the SharePoint site created by Microsoft Teams. Check the name in the browser, as you may have renamed the MS Team after the site was created.

**Tip:** If you can upload documents, but can't view linked documents, check the site field on the SharePoint Tab and ensure it doesn't have a trailing `/` after the site name.

**Version:** Select `SharePoint.com` for Office 365.

ORCLTD - I/M Options

File Help

Contact | Notes/DML Hotkey | Note Categories | Report Runner | E-mail | Suppl. Data | Sharepoint | Updates

Server:

Site:

Version:

Save Close


## Step 4. Notes/DML/Extender Tray Setup (I/M Options)

In Information Manager / Options / Notes/DML Hotkey, create the rules to link Sage 300 records to the SharePoint Documents.

### Add record to display all Vendor Documents on the A/P Vendor screen



In this case: All Vendor documents in a separate folder per Vendor, when opening the A/P Vendor screen in Sage 300 desktop.




You use the column names created in SharePoint for the SharePoint Field Labels and Values. You can also include them in the filter.



## Details

Line Number

Type

Sharepoint

RotoID

AP1200

Field label - {value}

VENDOR NUMBER

SharePoint Field Label

DMLFieldLabel

SharePoint Field Value

DMLFieldValue

Second Field label - {value2}

2nd SharePoint Field Label

2nd SharePoint Field Value

Folder

/Sage300DML/{value}

Filter

DMLFieldLabel='Vendor Number' AND DMLFieldValue='{value}'

Open SharePoint when adding document

No

SharePoint Field Associated Roto

DMLSageRotoID

Notification Method

None

Show alert

Show alert

Heading

SharePoint Vendor Documents

Save

Delete

Close

**Tip:** If you want the users to add a Title (or description) for the document as they are adding the file to SharePoint, you can select "Yes" for the option "Open SharePoint when adding a document". This will enable the operators to add a title for the document, in order to augment the file name when searching for documents.

### Add record to display Invoice documents when entering an A/P Invoice

On the AP Invoice entry screen, all documents in the Vendor folder tagged with the Document Number will be displayed.

The vendor folder is set by using {value} in the Folder field.

You can filter the documents based on the record value. You could use filters based on other columns in SharePoint if required.

**Details**

Line Number: 2

Type: Sharepoint

RotoID: AP2000

Field label - {value}: VENDOR NUMBER

SharePoint Field Label: DMLFieldLabel

SharePoint Field Value: DMLFieldValue

Second Field label - {value2}: DOCUMENT NUMBER

2nd SharePoint Field Label: DMLFieldLabel2

2nd SharePoint Field Value: DMLFieldValue2

Folder: /Sage300DML/{value}

Filter: DMLFieldLabel='Vendor Number' AND DMLFieldValue='{value}' AND DMLFieldLabel2='Document Number' AND DMLFieldValue2='{value2}'

Open SharePoint when adding document: No

SharePoint Field Associated Roto: DMLSageRotoID

Notification Method: None

Show alert: Show alert

Heading: Sharepoint by Vendor and Document Number

**Filter**  
DMLFieldLabel='Vendor Number' AND  
DMLFieldValue='{value}' AND  
DMLFieldLabel2='Document Number' AND  
DMLFieldValue2='{value2}'

Save Delete Close

**Example:**

Filter example: DMLFieldLabel='Vendor Number' AND DMLFieldValue='{value}' AND DMLFieldLabel2='Document Number' AND DMLFieldValue2='{value2}'

If you select Invoice INV123 for Vendor 1200 in Sage 300, DML will list all documents in SharePoint, where the columns are

DMLFieldLabel='Vendor Number'

DMLFieldValue='1200'

DMLFieldLabel2='Document Number'

DMLFieldValue2='INV123'

To view detailed field description: Notes/DML/Extender Tray Tab - SharePoint Configuration on the facing page

## Configure Tray - Overview

If Multi-Factor Authentication is enabled, there are 2 options to configure Document Management Link and the Tray, depending on whether Basic Authentication is enabled.

- Option 1: Leave the SharePoint details blank and DML will prompt the users for details or
- Option 2: Create an App password

## Configure Tray - Details:

- In all cases, select DML User
- Leave SharePoint details blank if using 2 factor authentication and you don't have an app password
- If using basic authentication or App Password, enter the user name and password / App Password.

The screenshot shows the 'Information Management' dialog box with the following fields and annotations:

- 1. Select DML User:** An orange callout box with an arrow pointing to the ☒ DML User checkbox.
- 2. Leave blank if using SharePoint with 2 factor authentication:** An orange callout box with an arrow pointing to the User input field.
- 3. Enter SharePoint details if using basic authentication or App Password:** An orange callout box with an arrow pointing to the Password input field.

The dialog box contains the following fields:

- ☒ DML User
- Sharepoint
  - User: [ ]
  - Password: [ ]
- Hotkey: [ F11 ]
- Last field
  - Roto ID: [ ]
  - Field Name: [ ]
- Save [ ] Cancel [ ]

## Using Document Management Link and SharePoint

Refer to Using Document Management Link with SharePoint for Office 365

## Troubleshooting DML and SharePoint

Troubleshooting Document Management Link with SharePoint for Office 365

## NOTES/DML/EXTENDER TRAY TAB - SHAREPOINT CONFIGURATION

In I/M Options > Notes/DML/Extender Tray, create a new row.

Select **SharePoint** Note Type

The screenshot shows a 'Details' window for configuring a Document Management Link. The window has a blue title bar with a gear icon and a close button. It contains various fields for configuration:

- Line Number: 4
- Type: Sharepoint
- RotoID: (empty)
- Field label - {value}: VENDOR NUMBER
- SharePoint Field Label: ERPFieldLabel
- SharePoint Field Value: ERPFieldValue
- Second Field label - {value2}: (empty)
- 2nd SharePoint Field Label: (empty)
- 2nd SharePoint Field Value: (empty)
- Folder: /Shared Documents/{value}
- Filter: ERPFieldLabel='Vendor Number' AND ERPFieldValue='{value}'
- Open SharePoint when adding document: (empty)
- SharePoint Field Associated Roto: ERPFieldLabel
- Notification Method: None
- Show alert: Show alert
- Heading: (empty)

At the bottom are buttons for Save, Delete, and Close.

Configure how the documents are linked to Sage 300 by screen and field label.

## ROTOID

RotoID - unique id for each screen - Optional

RotoID is the Sage 300 unique screen ID for the Desktop screen. You only need to enter it if you want to restrict the Document/Notes to one particular Sage 300 Screen.

Leave the RotoID field blank If you want the note / Document to trigger for all Sage 300 forms which have the Field label specified. The alert will show as per its configuration.

**Example:** For example, if you want Vendor Invoices only to show on the Vendor Activity screen, you would fill in the RotoID of AP1500.

For details on finding the RotoID, refer to How to find the RotoID of a Sage 300 screen

## SHAREPOINT FIELD LABEL AND FIELD VALUE

Also applies to SharePoint Field Value, 2nd SharePoint Field Label and 2nd SharePoint Field Value



- **Field Label:** Used when creating documents in SharePoint and to filter documents to display the SharePoint Document List
- **Field Value:** Data is populated by Document Management Link when adding a document and used to filter when viewing documents.

**Important!** SharePoint field labels are case sensitive.

## Document Management Link

**Example:** If you had the following fields on your SharePoint list :

Name Title Vendor DocumentNumber

INV123.pdf January 2012 invoice 1200 INV123

SharePoint Field Label 'Vendor'

SharePoint Field Value {value} 1200

2nd SharePoint Field Label 'DocumentNumber'

2nd SharePoint Field Value {value2} INV123

Document Management Link will replace {value} with the vendor's number when creating documents

Document Management Link will replace {value2} with the document number when creating documents

The screenshot shows the 'Details' window for configuring a Document Management Link. The fields and their values are as follows:

- Line Number: [Empty field]
- Type: Sharepoint
- RotoID: [Empty field]
- Field label - {value}: CUSTOMER NUMBER
- SharePoint Field Label: DocumentLink (Callout 2)
- SharePoint Field Value: DocumentLinkKey (Callout 3)
- Second Field label - {value2}: [Empty field]
- 2nd SharePoint Field Label: [Empty field]
- 2nd SharePoint Field Value: [Empty field]
- Folder: /Shared Documents/SharedData/AR Documents/ (Callout 1c)
- Filter: DocumentLink="Customer Number" AND DocumentLinkKey="{value}"
- Open SharePoint when adding document: Yes
- SharePoint Field Associated Roto: DocumentLinkScreen (Callout 4)
- Notification Method: None
- Show alert: Show alert

Buttons at the bottom: Save, Delete, Close.

## SHAREPOINT FOLDER

If you have selected SharePoint in Type, then fill in the SharePoint Folder where the documents will be stored for this Field Label & second Field Label combination.

**FILTER**

If you need to filter the SharePoint documents based on the values in Field Label , then fill in the required filter here. (Applies to SharePoint documents only)

**OPEN WITH SHAREPOINT WHEN ADDING DOCUMENT**

(Applies to SharePoint documents only)

**Yes**

If you add a document to SharePoint from the Document Management Link Alerts screen, and this option is set to Yes, then Document Management Link will open the SharePoint folder after the document has been added to SharePoint.

**No**

If you select No, then Document Management Link will give you a message once the document has been added, but the SharePoint folder will not be opened.

**SHAREPOINT FIELD ASSOCIATED ROTO**

If you want to filter SharePoint documents based storing the appropriate RotoID (Sage 300 screen id) on the SharePoint documents, then enter the Field Label from SharePoint where you will be storing the Associated RotoID. (Applies to SharePoint documents only)

**Example:** if the field in SharePoint which contains the Sage 300 RotoID is called ERP Screen ID then enter ERP screen ID here. This field label is not case sensitive.

**RENAME FILE TO**

You can optionally automatically rename the file when it is copied or dragged into the SharePoint and the value given here will be the file name. Wild cards \* and ? may be used.

Rename settings need to be consistent with the Folder settings if you filter based on the document name.

**Example:** EG '{value}\*' would prefix the file name with the field {value}. So dragging in a Word document called contract.doc would be renamed 1200contract.doc if {value} was Customer number and the customer on the screen was Customer 1200.

**Example:** EG '{value2}.\*' would rename the file with the contents of {value2}. So dragging in an Excel document called invoice.xls would be renamed INV123.xls if {value2} was Document Number and the document number on the screen was INV123.

**Example:** EG 'contract.\*' would rename the file with the letters 'contract'. So dragging in a PDF document scan20121201.pdf would be renamed contract.pdf

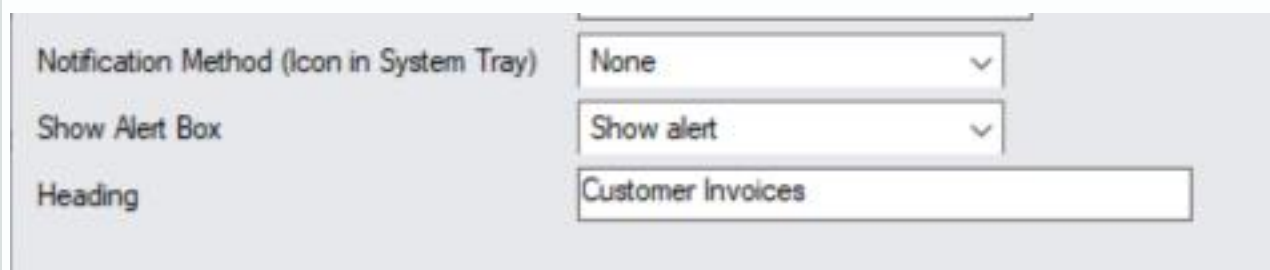
## Configure the Alert Box.

The most common setup for Notes and Documents is

Notification Method = None and

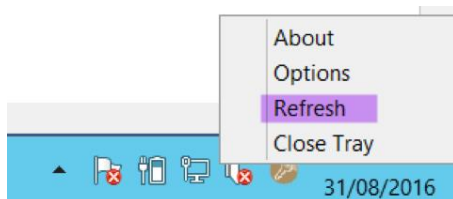
Show Alert = Show Alert.

In Alert Heading: Enter a description for the section in the Alert Box



For details on all configuration options, refer to: Notification and Alert Configuration (Notes/DML/Extender Tray Tab)

Refresh the Tray icon if you have made any changes on the IM Setup>Options in the current session as the Tray icon reads the current setup when the company is first opened.



**Tip:** If you have multiple Tray icons, Close the Sage 300 desktop and re-open to refresh the configuration.

## Troubleshooting SharePoint and the Tray

In the Tray, enter the SharePoint username and password.

If you leave the details in the tray blank, you

Refer to Troubleshooting Information Manager Tray

## More Details on Note Type

## Using Document Management Link- Network Folder

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

- An 'Alert Box' will open to reveal any documents saved in the configured folders based on values for the configured fields on that screen.
- The user can then open the document using the default program for the file extension configured on the machine.
- User can add new documents.
- Network folder security applies (or SharePoint if using).
- Most file types supported.

For details on setting up DML, Setup Document Management Link on page 11

### VIEWING AND EMAILING FILES

When opening a Sage 300 screen that includes a field that has been configured in I/M Options / Notes/DML/Extender Tray Setup, users can view documents that are in the configured folder.

Users can open any documents if they have the required network (or SharePoint if using) security rights.

**Tip:** When using Document Management Link with Network folder, you can right click on a file in the Alert Box, choose Email to open your default Email client and send an email directly from Document Management Link.

#### Note:

As Document Management Link doesn't store any data in the Sage 300 database, you don't have to add the documents through the DML Alert Box. You can add the documents to the configured folder manually in File Explorer, through a third party OCR system or using Orchid Extender to save Sage 300 forms as a PDF (for example AR Invoices, OE Confirmation OE Invoices or PO Purchase Orders). The documents can be displayed in the Alert Box.

If you rename the documents and filter based on the name, the documents need to have the correct name.

### ADDING DOCUMENTS IN THE ALERT BOX

There are two ways that you can add new document to a Document Management Link (DML) folder.

You can either:

## Document Management Link

- Click the "Add" button in the appropriate DML folder in the "Alert Box"
- Drag and drop the required document from File Explorer box or an email from Outlook to the appropriate DML folder

View the demonstration of Drag and drop files and emails in Document Management Link:

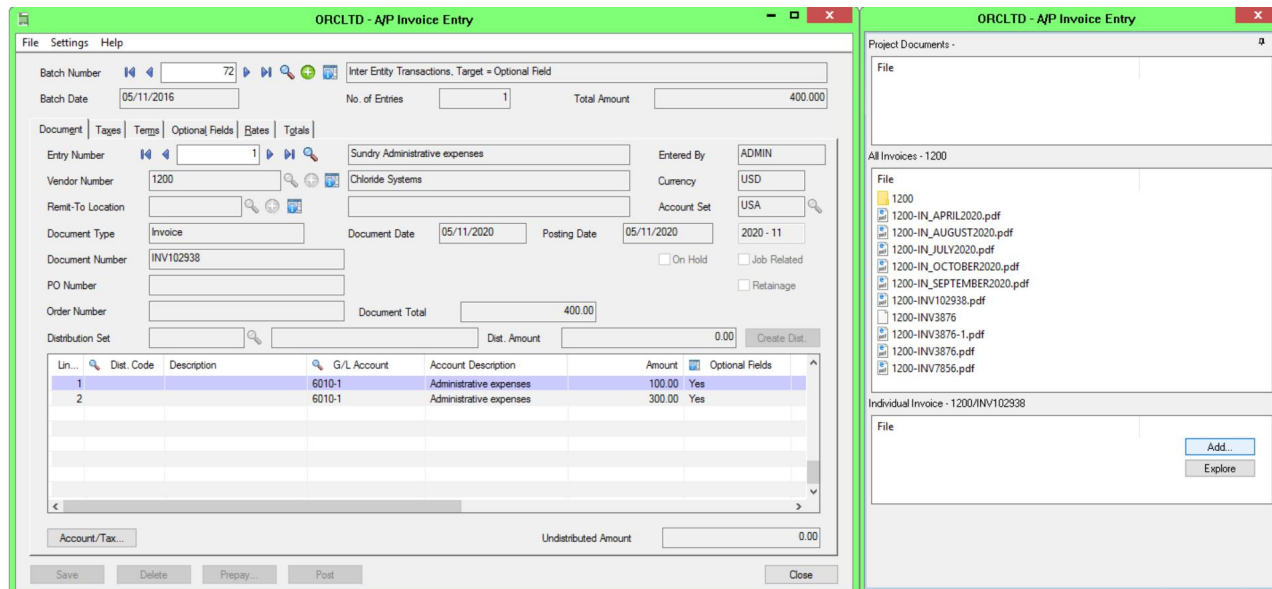
<https://www.orchid.systems/video/document-management-link-drag-drop-file-and-email-documents-attachments>

## USE ADD BUTTON IN THE DML BOX

Click the **Add** button in the appropriate DML folder in the "Alert Box", then use File Explorer to browse for the folder where the document currently resides. The file will be copied to the configured DML Folder.

**Tip:** Add will open the last folder used to select a file.

**Tip:** Depending on your configuration, the file is renamed based on the values on the screen. For details, Network Folder Configuration - Setup Notes/DML/Extender Tray Tab on page 14

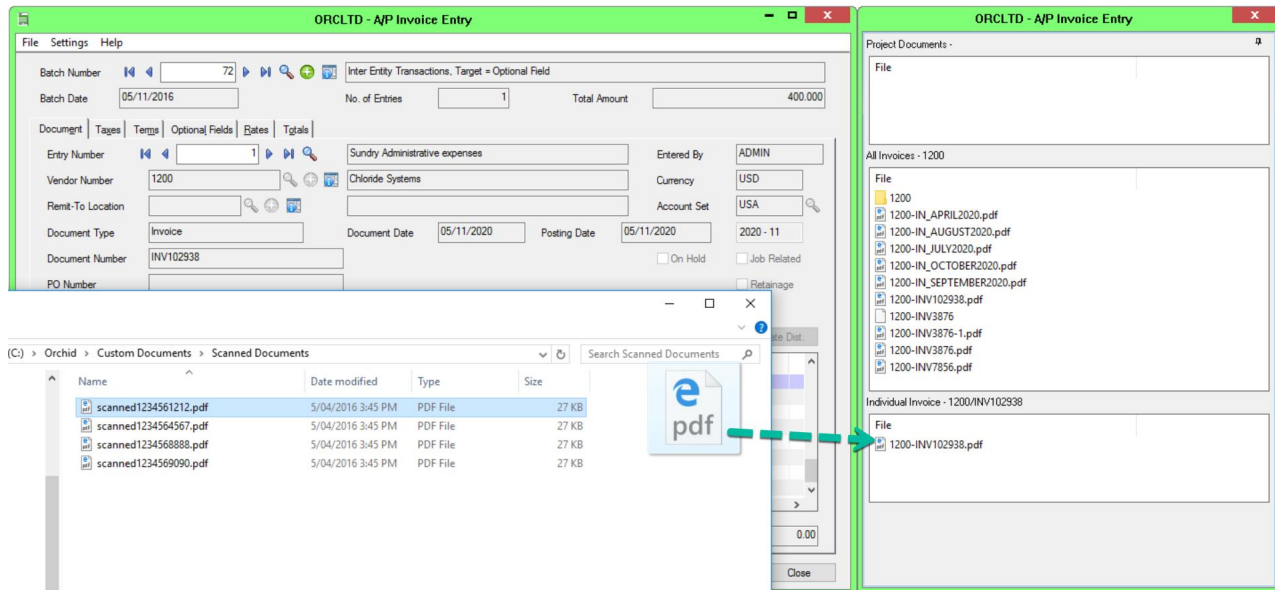


## ADDING FILES USING DRAG AND DROP

You can drag and drop files from File Explorer to the Alert Box to add files.

You can also drag and drop emails directly from Microsoft Outlook desktop client into Document Management Link Alert box. The eml file will be saved automatically in the appropriate folder and renamed based on the DML/Notes Hotkey configuration.

**Tip:** Click **Exp1ore** in the DML Alert Box to open Windows Explorer.



## WHEN USING SHAREPOINT

After you add a document to the Alert Box, SharePoint will open if you have configured it in I/M Options. You can then update additional metadata, for example the document title.

**Tip:** If required, you can use F5 from the DML Alert Box to refresh the list of SharePoint documents for the record you have selected.

## TIPS WHEN ADDING DOCUMENTS

### Drag and Drop and UAC

In some cases, the Add option works, but the Drag and Drop feature doesn't work. There are no errors, but the file is not copied. This typically occurs when:

- User Access Control (UAC) is enabled on the workstation
- Sage 300 has been launched by selecting the option "Run as Administrator"
- The user is logged on to the workstation as another user, rather than Administrator

In this case, UAC prevents the copying of the file. This may be because the local Administrator account does not have access to the mapped drive, or the UAC access token for the File Explorer application

## Document Management Link

(granted to the logged-on user) is not the same as the UAC access token for the DML Alert Box (granted to Administrator, as Sage 300 was "Run as Administrator").

Resolution is to either:

- Do not select the option "Run as Administrator" for Sage 300, or;
- Turn off UAC on this workstation

## USING SHIFT AND DRAG TO MOVE DOCUMENTS

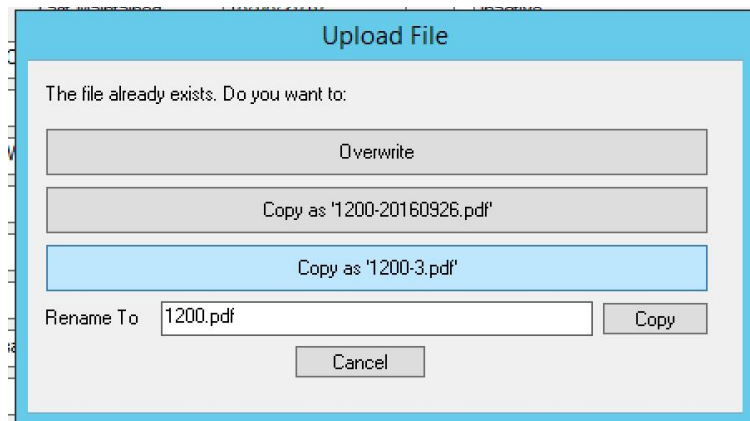
The Document will be copied or moved to the configured folder in I/M Options:

DRAG to Copy a document (leaving the original in place): click on the file, hold the mouse button down, and drag the file), or;

SHIFT-DRAG to Move a document: hold down shift, click on the file, hold mouse button down, and drag the file to the DML Alert Box).

## If a file already exists with the same name

If a file already exists in the folder when you drag or add a file in Document Management Link, you will be prompted to select an option to overwrite or rename the file to a unique name (add today's Date after the name, add a number after the name or type a new name).

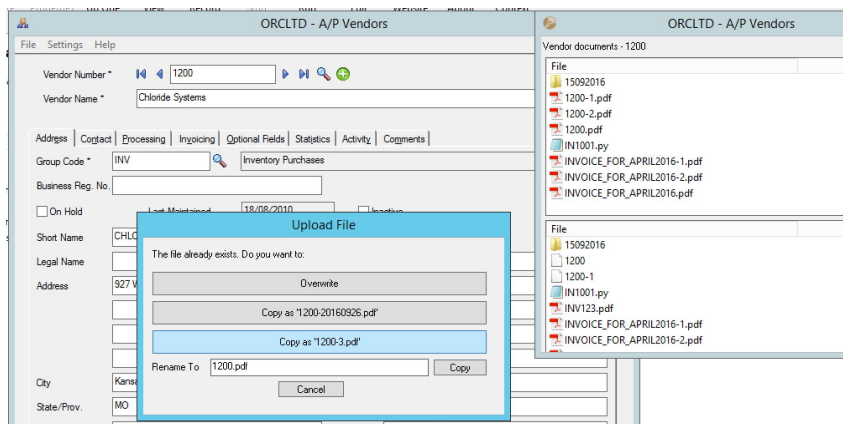




**Example:** Rename document based on Vendor Number

If you want to rename all files for a vendor based on the Vendor Number and a sequence, you could configure the Notes/DML Hotkey record to rename the file Vendor.ext

Users would need to select Copy as vendor-xxx.pdf to achieve the sequencing.

**EXAMPLE CONFIGURATION TO RENAME DOCUMENTS BASED ON VENDOR NUMBER**

Details

Line Number: 6

Type: Network Folder

RotolD:

Field label - {value}: VENDOR NUMBER

Second Field label - {value2}:

Folder: F:\Orchid\Custom Documents\AP Documents\{value}

Show folders: Folders and Files

Rename File To: {value}.{ext}

Notification Method: Automatically popup

Show alert: Show alert

Heading: Vendor documents

Rename File To

You can optionally rename the file when you copy (or drag) it to the folder. You can use the following:

If field 1 was '1200' and field 2 was 'INV123' and the file was originally called a.b.txt then:

- \* = a.b.txt
- {name} = a.b
- {ext} = .txt
- {value}\* = 1200a.b.txt
- {value2}\* = INV123a.b.txt
- {value2}.{ext} = INV123.txt

You can use the following:

- {name} - the file name portion
- {ext} - the file extension
- {value} - the first field value
- {value2} - the second field value
- {yyyy} - the year
- {yy} - the 2 digit year
- {m} - the single digit month
- {mm} - the 2 digit month
- {mmm} - the 3 letter month name
- {M} - the full month name
- {d} - the single digit day
- {dd} - the 2 digit day

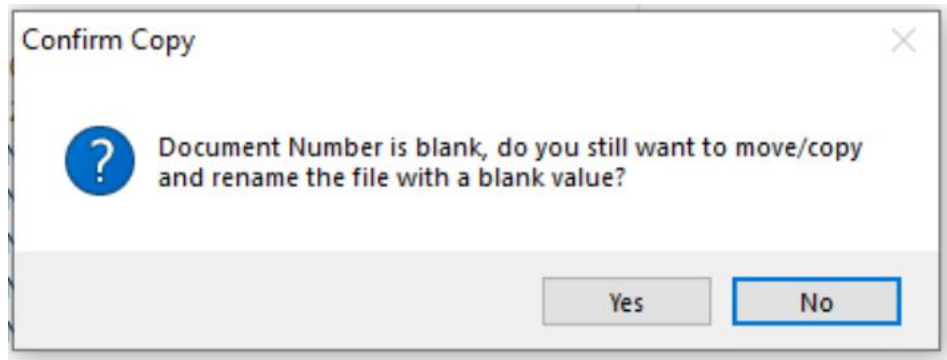
Save Delete Close

## Renaming a file and blank field name

When you add a file to the Alert Box, you may get a warning: "Document Number is blank, do you still want to move/copy and rename the file with a blank value?"

This indicates that DML is configured to rename based on a field on the Sage 300 that has not been populated yet.

In most cases, select No, enter the value in Sage 300 and try adding the document again.



## PIN THE TRAY

Users can use the Pin icons on the tray to pin the I/M Alert box that displays Notes and Documents to the Sage 300 screen they relate to.



Users have the option to "Pin" (icon points down) the Alert Box to the "base" screen. Users can then move the Alert Box and the base screen together and they can minimize both the screen and the Note simultaneously.



When unpinned (icons points left), the Alert Box can be displayed separately from the main screen. This is useful to display the Notes and Documents on a second screen.

**Tip:** When the tray is unpinned, the Alert Box may overlap other applications. Users can close the Alert Box and click on the Yellow Note Icon to re-open the Notes panel when they are using the base screen again.

## Using Email SmartLink

Email SmartLink provides the ability to send an email from a Sage 300 screen, including a hyperlink to the screen and specific records. Email recipients can then open the Sage 300 screen.

**Requirement!** You need to be a **DML User** and have a license available or be configured as a **Workflow User** to use this functionality to send the email and to open the Sage 300 screen. Refer to the Orchid website for details: [Orchid Users](#)



Click on the Email icon, available on all Sage 300 screens. This will open your default mail client (Outlook or other).

Paste / Ctrl V to copy the link to the body of the email, add other comments and Send the email.

### Tip:

#### Outlook security warning

You may get a security warning message when opening the link from Outlook. You can click "Yes" and the configured Sage 300 screen will open with the appropriate record.

If you would like to turn off this message, you need to create or edit the registry value for the "DisableHyperlinkWarning" key in the Microsoft Office folder.

**Enter 1 as the value to disable the warning. Delete the key or use a value of 0 to enable the warning.**

Outlook 2016: HKEY\_CURRENT\_USER\Software\Microsoft\Office\16.0\Common\Security

#### FOR OLDER VERSIONS OF OUTLOOK

Outlook 2013: HKEY\_CURRENT\_USER\Software\Microsoft\Office\15.0\Common\Security

Outlook 2010: HKEY\_CURRENT\_USER\Software\Microsoft\Office\14.0\Common\Security

Outlook 2007: HKEY\_CURRENT\_USER\Software\Microsoft\Office\12.0\Common\Security

#### IF THE SECURITY KEY DOES NOT EXIST IN YOUR REGISTRY, CREATE IT

Right click on Security key and choose New, DWORD.

Type (or paste) DisableHyperlinkWarning as the Value name then double click on it.

Enter 1 as the Value data to disable the warning.

**Important!** Please liaise with your IT Support team before amending registry settings.

## Email Recipient

The email recipient can click on the link, and open the screen with the selected record, for example AR Customer Screen for Customer 1200, Mr Ronald Black.

**Note:** If the user is not logged in to Sage 300, the email recipient will be prompted to logon with their usual Sage 300 credentials.

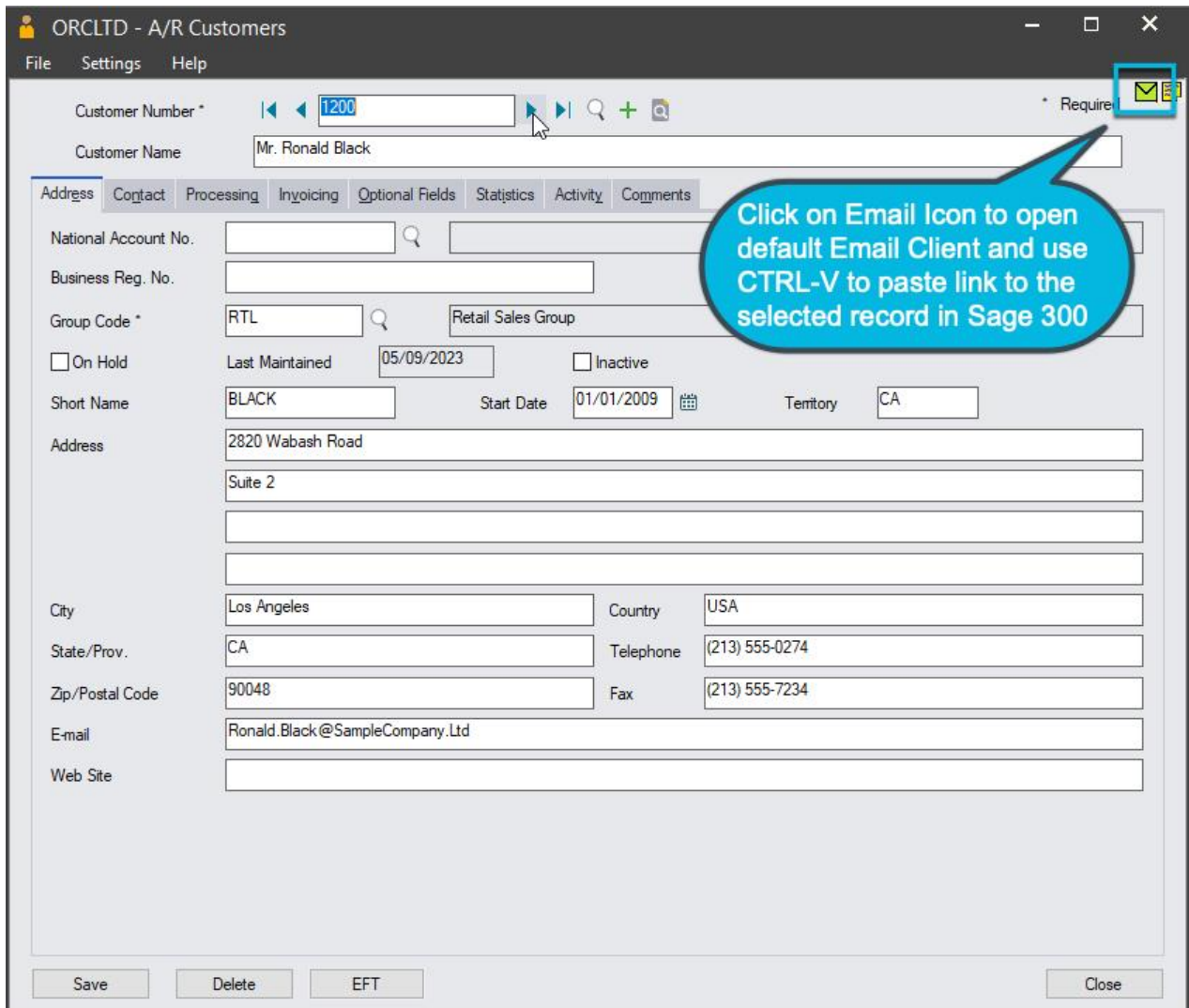
## EXAMPLE ON THE AR CUSTOMER SCREEN

Click the Email icon. Hover over the icon to view the **Send email** tooltip :



This opens your default Email editor.

## Document Management Link



ORCLTD - A/R Customers

File Settings Help

Customer Number \* 1200

Customer Name Mr. Ronald Black

Address Contact Processing Invoicing Optional Fields Statistics Activity Comments

National Account No. [ ]

Business Reg. No. [ ]

Group Code \* RTL Retail Sales Group

☐ On Hold Last Maintained 05/09/2023 ☐ Inactive

Short Name BLACK Start Date 01/01/2009 Territory CA

Address 2820 Wabash Road

Suite 2

City Los Angeles Country USA

State/Prov. CA Telephone (213) 555-0274

Zip/Postal Code 90048 Fax (213) 555-7234

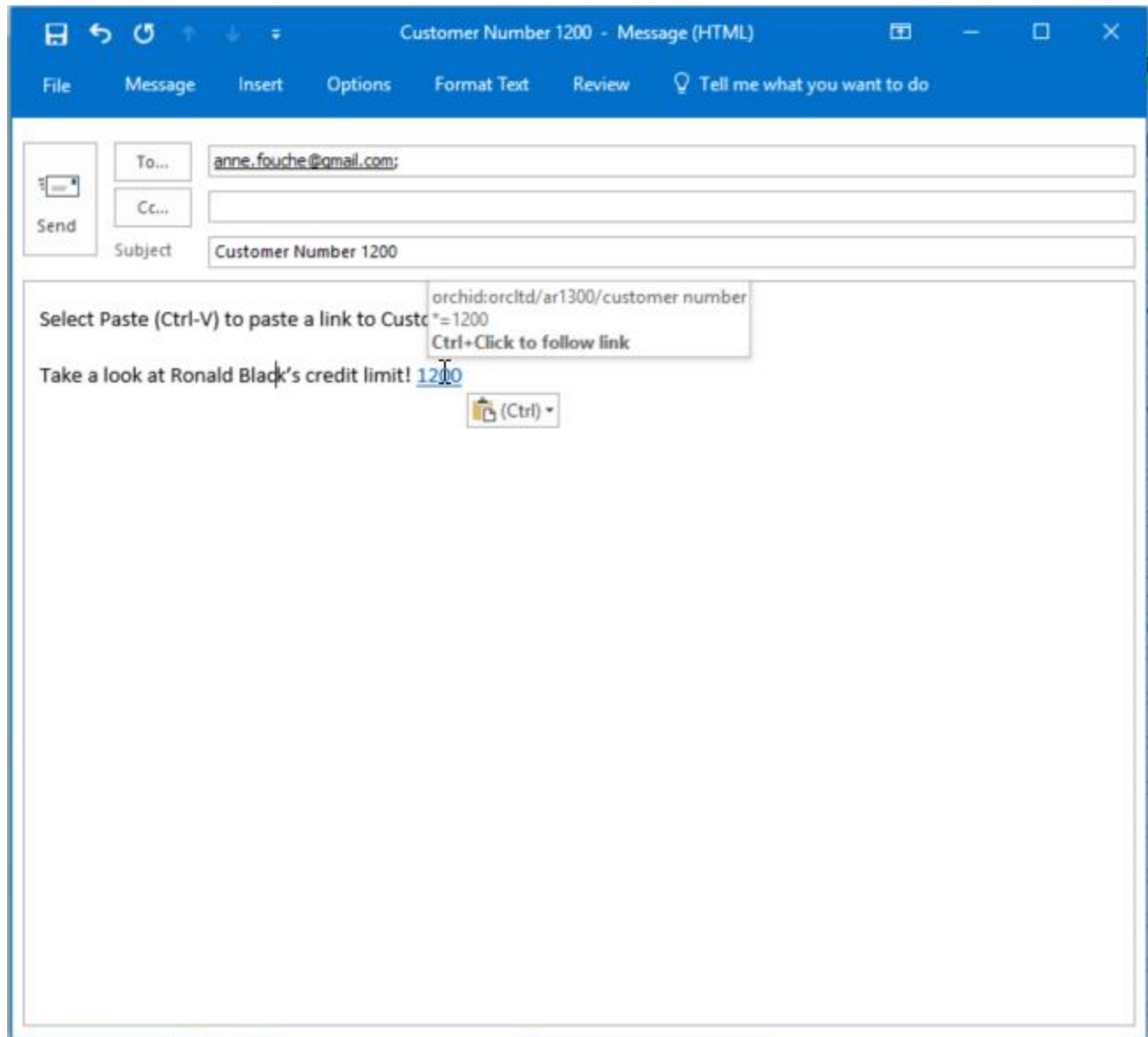
E-mail Ronald.Black@SampleCompany.Ltd

Web Site [ ]

Save Delete EFT Close

Click on Email Icon to open default Email Client and use CTRL-V to paste link to the selected record in Sage 300

You can paste the link to the A/R Screen with customer Number 1200.



The email recipient can click on the link in the email, and open the screen with the selected record, for example AR Customer Screen for Customer 1200, Mr Ronald Black.

**Requirement!** The sender and recipient both need to be setup as a **DML User** or an Extender **Workflow User**.

## DETAIL SETUP AND EXAMPLES

1. Activate Orchid Information Manager in the Sage 300 database.
2. In I/M Options / Notes/DML/Extender Tray Setup, set "Automatically Start Notes/DML Tray" is set to Yes

## If using Document Management Link

3. In the system Tray, select the Orchid I/M Tray icon and drag it on the task bar.
4. Click on the Tray icon in the task bar, select "Options"
5. Ensure "DML User" is ticked.
6. Restart Sage 300 Desktop.

The Email link functionality is now available on all Sage 300 screens.

For details, refer to Configure Tray for DML User

## If using Extender and Workflow Users

Sage 300 users configured as "Workflow Users" in Extender License screen have access to Email SmartLink functionality.

Refer to details in Extender Setup . Extender License and Workflow Users







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