Orchid
Training Guide:

Work Smarter with Orchid

Notes

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).

Table of Contents

Notes Overview

I/M Notes lets you attach an electronic note to Sage 300 (Accpac) fields, to help users complete their daily tasks more effectively. You record your own information in a Note, giving you context and data sensitive pop-up notes from any Sage 300 (Accpac) screen. You can also include pictures in the pop-ups.

Messages can be about specific data or fields, or customers or products. Notes messages can show every time a field/screen is used or tied to specific data, e.g. users, specific customers and products.

Notes can be free format, grouped by Note Type (Using Information Manager Notes module only) or a list of nominated fields (Using Information Manager Optional Tables in addition to I/M Notes).

Setup can be customized with user definable Note types and colors, notification by pop up message or system tray icon to indicate different types of messages, and role-based Notes to target your messages to the right people.

For both modules, you need to configure the Tray icon and the Alert Box.

> **Note:** Using Information Manager Notes with other Modules

- If using Information Manager Notes in conjunction with Information Manager Optional Tables, Notes can be defined from a list of nominated fields.
- If using Information Manager Notes in conjunction with Orchid Extender, you can configure Notes based on scripts, for example Conditional Notes and Notes that retrieve data on the fly.

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 EB65A.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

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.
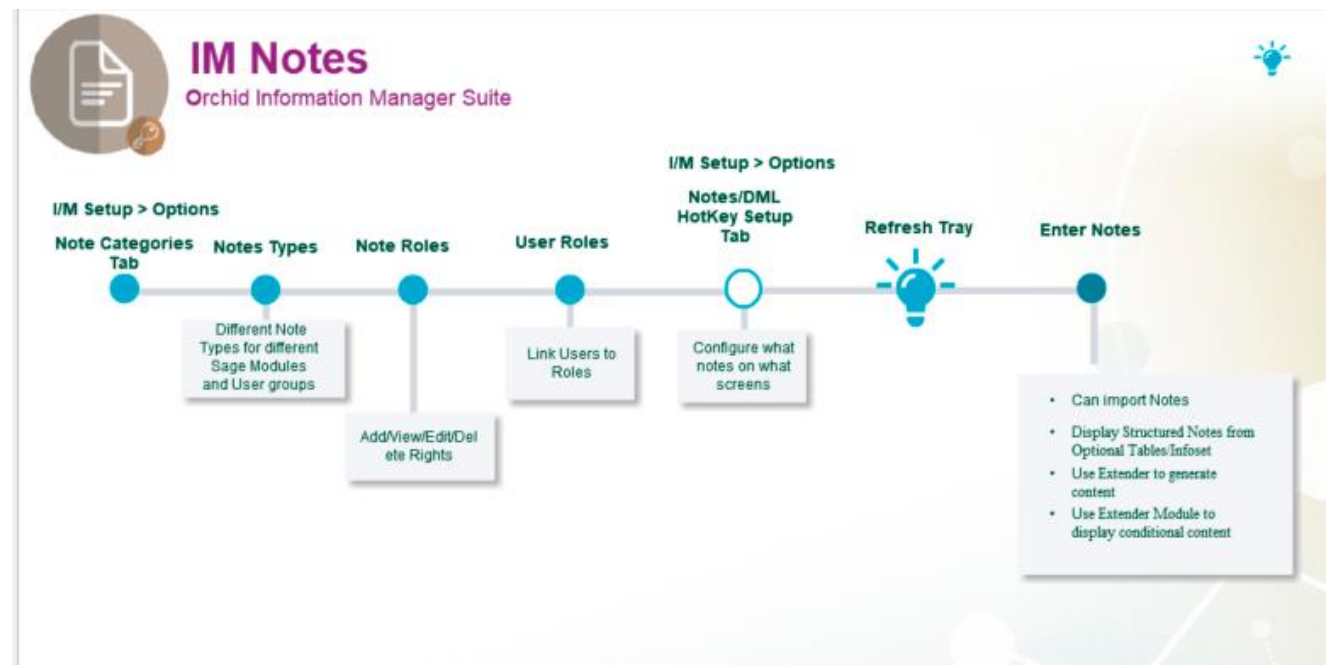
Setup Notes

Key Steps below apply to free text as well as structured notes.

Tip:

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

Detailed field description depends on the type of content required in the note.

Detailed Field Description

To configure free text notes, see Options / Notes/DML/Extender Tray Tab: on page 17

To configure Notes based on Information Manager Optional Tables fields,Infoset details and Notes on page 22

To configure Conditional Notes and Notes generated on the fly based on Extender Scripts,Extender Script- Setup Notes/DML/Extender Tray Tab (I/M Options) on page 28

Notification and Alert setup Description

Notification and Alert Configuration (Notes/DML/Extender Tray Tab) on page 40

Tip:

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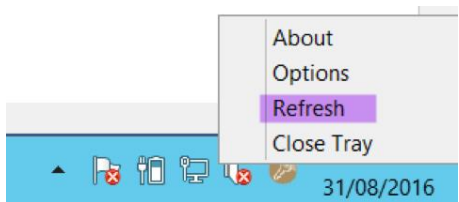
Tip: If you have multiple Tray icons, Close the Sage 300 desktop and re-open to refresh the configuration.

OPTIONS / NOTES CATEGORIES

Configure Notes Categories to associate different color to Notes

---

There is no limit to the number of categories that can be created.

> **Note:** These categories are applied as a default for Infoset notes and Notes. On any one Infoset note or Note, the category can be overriden to show the specific note in a different colour.

FIELDS AND CONTROLS

CATEGORY

Type a category name

COLOR

Assign a color to the category created

To define colours, double click on the colour column, and select the colour from the available options, or click on Define Custom Colours to select a different shade of the 48 basic colours.

- Options Form - SharePoint Tab

NOTES TYPE FORM

When to Use

Use the Note Types form to classify notes into different types e.g. Administration, Sales, Items, etc. Each Note Type can have a default Category (colour).

Detailed Fields

- **Allow Multiple notes for Same Key** If you require one note per key (for example customer), then set "Allow multiple notes for same key" to No. If however you require multiple notes (per date / user etc), then set "Allow multiple notes for same key" to Yes.
- You can define the **default Note Category** for each Note Type. IE the Note will be displayed with the associated Colour with the Category, unless overwritten on a note by note basis.

Next Steps

> **Tip:** Remember to use different Note types for different master files that could share the same ID / key value. (e.g. Vendor Notes vs Customer Notes). If you use the same note type for a Vendor Note and a Customer Note, the vendor note for vendor ID 1200 will show when looking at the customer ID 1200.

ROLES FORM

Use the Roles form to create roles for the different Note types for users to add\read\update\delete notes.

Next step: Setup User Roles below

ROLE TYPES FIELDS AND CONTROLS

To apply a role to a note type, double click the security option and the active types will be marked with an X

- With the Role "**Add**" you will be able to add your own notes, edit your own notes and delete your own notes for the nominated Note Type.
- With the Role "**read**" you will be able to read Notes created by any users in this Note Type.
- With the Role "**update**" you will be able to read an update any Notes in this Note Type.
- With the Role "**delete**" you will be able to delete any Notes in this Note Type.

> **Note:** If you only have Add (and not edit or delete) then you can edit/delete notes that you create, but not notes that other users have created, unless you are given "update" or "read" to this Note Type.

SETUP USER ROLES

Sage 300 users have access to notes based on User Roles and not Sage 300 security profiles.

ASSIGN USERS TO ROLES TO GRANT/DENY USERS ACCESS TO NOTES

If a user is not assigned to a role, then they will not be able to access any notes. Security permissions per role is assigned in the Roles Form on the previous page.

> **Note:** If you only have Add Role (and not edit or delete) then you can edit/delete notes that you create, but not notes that other users have created.

FIELDS AND CONTROLS

For each user who needs to access Notes, select a Role Name.

OPTIONS / NOTES/DML/EXTENDER TRAY TAB:

Select **Note** Note Type -Alert Based on free format text box

AUTOMATICALLY START THE NOTES/DML

Select "Yes" for the "Automatically Start Notes/DML Tray" option

The Tray will automatically start for all Sage 300 users, using their currently logged on credentials.

In order for Notes or Documents to be displayed for the user, the tray icon needs to be running while the user is active in Sage 300 .

> **Note:** Individual Users can overwrite the Notes setup in the IM Transactions / Notes User Options. See details in Notes User Options on page 42

CONFIGURE WHICH SAGE 300 FIELDS/SCREENS DISPLAY THE NOTES.

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

DISPLAY ORDER (IM OPTIONS / NOTES/DML HOTKEY TAB)

Enter a number from zero to 9999 to indicate the display order for this note. If you have two or more notes configured around the same screen then the notes will be displayed in this order where zero is first, one is second, etc.

Display Order is updated in the Grid view (and not the Details View).

> **Example:** ("CUSTOMER NUMBER" on the AR Customer screen or "CUSTOMER NO." on the AR Customer Inquiry.

Tip: If you want the same notes to show on both the AR Customer Screen and the AR Customer Inquiry, you need to add two rows in the I/M Setup>Options on the Notes/DML/Extender Tray tab. One for the Field Label "CUSTOMER NUMBER" and one for the Field Label "CUSTOMER NO."

FIELDS AND CONTROLS

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 Extender Workflow 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 Extender Workflow 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.

NOTE TYPE

Select the required Note Type which has been created inNotes Type Form on page 15.

This only applies if you have selected **Note** in the Type Field.

OPTIONS FORM FIELD LIST - SHOW IN ALERT

This applies if the Note Type "allows multiple notes for the same key" (See Notes Type Form on page 15).

Select what note/notes to be disiplayed in the Alert Box.

- All the notes in the list
- The first note in the list - Based on date created
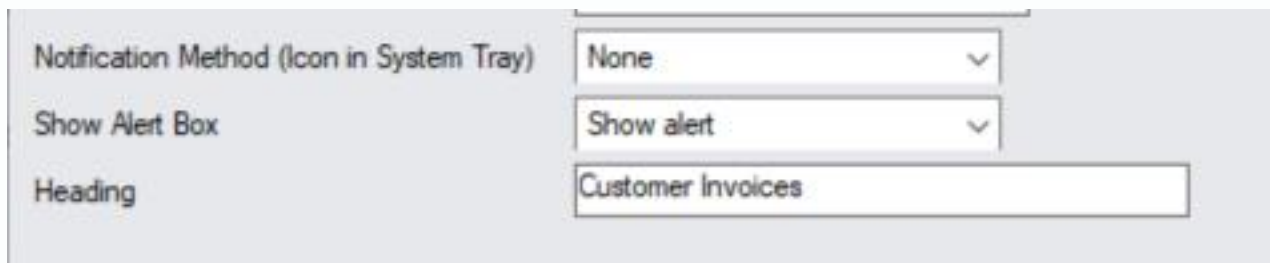- The last note in the list - Based on date created

CONFIGURE HOW THE NOTES WILL BE DISPLAYED IN 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

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) on page 40

SAVE AND REFRESH TRAY

Save The Detail Hotkey Setup And Save The I/M Options

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.

INFOSET DETAILS AND NOTES

WHEN TO USE:

Configure Notes/DML/Extender Tray to display structured notes in the Alert Tray.

Infoset Notes Setup - Notes/DML/Extender Tray Tab (I/M Options)

Select **Infoset** Alert Type -Alert Based on structured data / Optional fields setup in Information Manager Optional Tables / Setup / Infoset Codes.

Requirement! Requires Sage 300 Optional Field module and Orchid Optional Tables.

Example:

Example with one Field - LOCATION

Example with Customer Number and Item Number

AUTOMATICALLY START THE NOTES/DML

Select "Yes" for the "Automatically Start Notes/DML Tray" option

The Tray will automatically start for all Sage 300 users, using their currently logged on credentials.

In order for Notes or Documents to be displayed for the user, the tray icon needs to be running while the user is active in Sage 300 .

> **Note:** Individual Users can overwrite the Notes setup in the IM Transactions / Notes User Options. See details in Notes User Options on page 42

DISPLAY ORDER (IM OPTIONS / NOTES/DML HOTKEY TAB)

Enter a number from zero to 9999 to indicate the display order for this note. If you have two or more notes configured around the same screen then the notes will be displayed in this order where zero is first, one is second, etc.

Display Order is updated in the Grid view (and not the Details View).

Configure which Sage 300 Fields/Screens display the Optional Table/Infoset content in the Alert Box.

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 Optional Table - Infoset 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 Optional Table - Infoset 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.

INFOSET TYPE

Infosets allow you to add and display structured data in the Sage 300 screens, enabling you to add Optional Fields to any Sage 300 screens.

Select the required InfoSet which holds the definition of the required optional fields for the notes.

Infosets are created in"Infoset Code Setup Overview" (Infoset Type)

Only applies if you have selected InfoSet in the NoteType field

OPEN WITH

When you click "edit" to insert/amend an existing InfoSet note you can optionally open the Information Entry screen or Information Entry Grid screen to do your editing.

If you are storing multiple records against one key combination (for example budget records) then select "Information Entry Grid" Screen.

If you are storing a single record per key combination (for example you have an InfoSet to store the link to the item picture), then select "Information Entry" Screen

Applies to InfoSet notes only.

OPEN ATTACHMENT

Applies to InfoSet notes only. Select Yes or No to open an attachment linked to the configured InfoSet Note.

You can only store one document against each infoset record. It can be set to auto open in the alert box – but then it always opens. If you do not auto open you need to click "edit" on the Alert box, and then you need to click F6 to open the document.

Configure how the Notes will be displayed in the Alert Tray.

> **Tip:** The most common setup for Notes and Documents is Notification Method = None
>
> and Show Alert = Show Alert.

NOTIFICATION METHOD

This option refers to the Information Manager Tray icon in the System Tray.

It is configured in I/M Setup > I/M Options > Notes/DML/Extender Tray Tab.

Select one of the following notification methods for the user to be notified if a note exists :

- **None** – Choose if you want to use the alert box only
- **Change Tray Icon** – to force the tray icon to go red if notes exist for the screen.

  If there are any notes in the system relating to the open screen will display as

- **Blink Tray Icon** – to force the tray icon to go red and blink if notes exist for the screen
- **Automatically pop up** - to force the entry screen to open automatically . When used with an Info-set Note type, Open the associated data entry screen "Information Entry Grid" or "Information Entry" screen as configured in the "Open With Column".

  > **Note:** If the note/document is not configured to Automatically Popup, you can use the Hotkey (F11 by default) to bring up the Alert Box to view / add notes and documents for the field/screen selected.

SHOW ALERT

This option refers to the Alert Box that opens next to the Sage 300 screen.

Do not show alert : no alert box will be shown

Show Alert and fade out : the alert box will be shown on the screen for approximately 5 seconds and then fade out

Show Alert : the alert box will be shown on the screen until the user clicks "close" to close the Alert box

ALERT CONTENT

Applies to InfoSet notes only. Select what content is to be displayed. See "Infoset Entry" for more details on these fields.

- Show Comment
- Show Description
- Show Comment and Description
- Show Reference
- Show Comment and Reference
- Show Description and Reference
- Show Comment, Description and reference

Alert Box Heading

Type the description you want to see before the values.

> **Note:** This setting exists only in Sage 300 v 2016 and above.

> **Note:** The Sage 300 ORGID and screen name are automatically included in the Alert Box heading.

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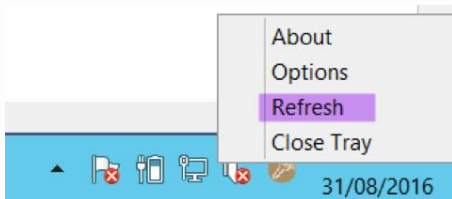
> **Tip:** If you have multiple Tray icons, Close the Sage 300 desktop and re-open to refresh the configuration.

EXTENDER SCRIPT- SETUP NOTES/DML/EXTENDER TRAY TAB (I/M OPTIONS)

Select **Extender Script** Note Type -Alert Based on Extender Script (For further details on note type, view below)

Note: This requires the Orchid Extender module.

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 Extender Work-flow 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 Cus-tomer 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 Extender Workflow 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.

Extender Script Type

Browse to select the Extender script to be run to generate content for the Note.

> **Note:** This requires Orchid Extender and the script must be imported into Extender. Refer to Extender Documentation for details.

The Field Label value is determined by how the Extender Script is configured.

Orchid sample scripts relate to Customers, so the Field Label should be set to CUSTOMER NUMBER
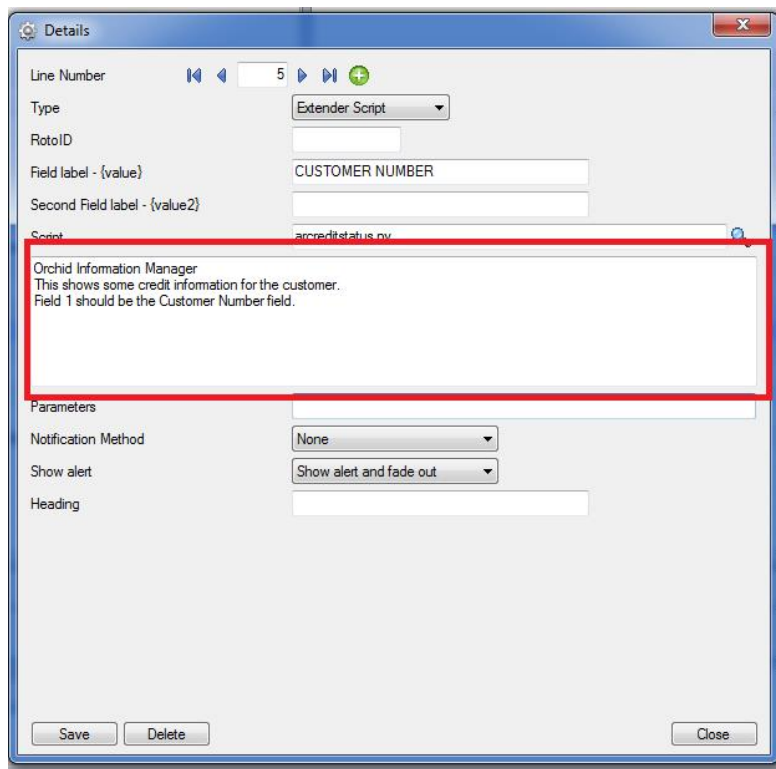
Parameters

Enter the parameters required to run the script if the script expects a parameter.

Configure how the Notes will be displayed in the Alert Tray.

Tip: The most common setup for Notes and Documents is Notification Method = None and Show Alert = Show Alert.

NOTIFICATION METHOD

This option refers to the Information Manager Tray icon in the System Tray.

It is configured in I/M Setup > I/M Options > Notes/DML/Extender Tray Tab.

Select one of the following notification methods for the user to be notified if a note exists :

- **None** – Choose if you want to use the alert box only
- **Change Tray Icon** – to force the tray icon to go red if notes exist for the screen.

    If there are any notes in the system relating to the open screen will display as

- **Blink Tray Icon** – to force the tray icon to go red and blink if notes exist for the screen
- **Automatically pop up** - to force the entry screen to open automatically . When used with an Info-set Note type, Open the associated data entry screen "Information Entry Grid" or "Information Entry" screen as configured in the "Open With Column".

> **Note:** If the note/document is not configured to Automatically Popup, you can use the Hotkey (F11 by default) to bring up the Alert Box to view / add notes and documents for the field/screen selected.

SHOW ALERT

This option refers to the Alert Box that opens next to the Sage 300 screen.

Do not show alert : no alert box will be shown

Show Alert and fade out : the alert box will be shown on the screen for approximately 5 seconds and then fade out

Show Alert : the alert box will be shown on the screen until the user clicks "close" to close the Alert box

Alert Box Heading

Type the description you want to see before the values.

> **Note:** This setting exists only in Sage 300 v 2016 and above.

> **Note:** The Sage 300 ORGID and screen name are automatically included in the Alert Box heading.

Entering Notes - Screen Guide

Use this screen to add/view/edit/delete notes.

The Key field depends on the note configuration. In most cases, you will mainly use this screen to view and edit Notes.

> **Tip:** You can import Notes into Sage 300. See Importing Notes on the next page

> **Note:**
>
> There are other ways to view/enter notes in Information Manager.
>
> - You can use the Hotkey (F11 by Default) to add Notes from a Sage 300 screen where a Note is configured.
>
> - Use the Note icon on the Sage 300 screen.
>
> For details, refer to Using Notes.

IMPORTING NOTES

Information Manager - Notes supports imports from CSV file and Excel.

import from CSV file.

The file must have columns NOTETYPE, KEY, CATEGORY, TEXT, RTF.

> **Note:** NOTETYPE and KEY are mandatory fields and can not be blank.

If the Note Type is set to "No" for allow multiple notes on same key, the import will allow you to insert new note or update existing note.

But if the option is set to "Yes", then the import will only insert as new.

Import From Excel

Import from Excel file template is also available, the **template** is in the Sage 300 Program files \ EBXXA\NotesImport.xlsm.

Once the data is populated on Template worksheet, click on 'Insert I/M Notes into Sage ERP' on the **Info** worksheet.

Enter the details to login to Sage 300 to run the import macro.

Notes Screen Guides

INFORMATION MANAGER OPTIONS FORM - OVERVIEW

You select options when you create your Information Manager Module. Once you have set up your module, use this form when you need to change your selections.

Use this form to:

- Specify the contact name, telephone number, and fax number for your Information Manager module. (Use the Contact tab)
- Specify which screen/field label combinations are to trigger Alerts to be shown to the users – based on a list of documents in SharePoint, a list of files in a network folder, a free format text box , a list of pre-defined optional fields or a custom Extender Script. (Use Notes/DML/Extender Tray tab).
- Define free format text box note categories with associated colours. (Use Notes Categories tab)
- Allocate destination to store reports that are to run by the Report Runner. (Use Report Runner Tab)
- Configure your email settings to email reports using Report Runner, or Financial Report Runner. (Use e-mail tab)
- Allocate default destination to store attachments to Infoset notes to be displayed against configured screen/field label combinations. (Use Suppl. Data Tab)

For details on each Tab and Fields, refer to: Options Form - Screen Guide on the next page

OPTIONS FORM - SCREEN GUIDE

> **Requirement!** You will see different Tabs depending on which modules of Information Manager you are licensed for.

Contact Tab

FIELDS AND CONTROLS

COMPANY NAME AND ADDRESS

To change the company name and address, or to change the contact name, telephone number, and fax number at the company level, use the Company form in Common Services.

CONTACT NAME AND DETAILS FOR INFORMATION MANAGER

Enter the name of the person or position who is the contact for the Budget and Information Management system.

To change the contact name, telephone number, and fax number for the Information Manager administration, use the Contact Options page of the Options form in the Setup form.

Depending on the choice of the Format Phone Numbers option in the Company Profile in Common Services, parentheses and hyphens may be inserted.

Notes/DML/Extender Tray Tab

Specify which screen/field label combinations are to trigger Alerts to be shown to the users – based on a list of documents in SharePoint, a list of files in a network folder, a free format text box , a list of pre-defined optional fields or a custom Extender Script.

AUTOMATICALLY START NOTES/DML TRAY

Select "Yes" if you require the Notes/DML Tray to open for all users as they log into Sage 300 .

Select "No" if you are going to use the StartUp folder to start the Notes/DML Tray for selected users.

NOTE TYPE FIELD DESCRIPTION

Select from

- Note if you require alerts based on unstructured data, ie a free format text box as long as you want. (IM –Notes module only)
- Infoset if you require alerts based on structured data, ie a list of optional field values. (IM – Supplementary Data module only)

- Network Folder if you require alerts based on a list of files in a nominated network folder. (IM – Document Management Link only)
- SharePoint if you require alerts based on a list of files in a nominated SharePoint folder. (IM – Document Management Link only)
- Extender Script if you want to run an Extender script to generate content for the Note Alert Box (requires Orchid Extender module).

Notes Categories Tab

Use this tab to create categories for your notes to determine the background colour.

See details in Options / Notes Categories on page 12and Setup Notes on page 11

Report Runner Tab

Select a destination to store reports.

See details on I/M Setup / Options / Report Runner Tab

E-mail Tab

Fill in your E-mail server details if you are going to be sending reports via E-mail from Report Runner.

For details Email Tab (I/M Setup / Options)

Suppl. Data Tab

Use this screen to choose whether to allow multiple Infosets and to specif the default path for InfoSet Attachments.

Refer to Setup Optional Tables

SharePoint Tab

Use this Tab to configure Document Management Link to display documents stored in SharePoint.

For details, see SharePoint Configuration - Notes/DML/Extender Tray Tab (IM Options)

Updates Tab

NOTIFY ME WHEN THERE ARE NEW UPDATES IN INFORMATION MANAGER

Users can now "subscribe" to notifications of updates.

By Default, this option is not selected for end-user serial numbers

The check is stored in the registry and it applies to this Windows user on this computer.

If selected, when starting Sage it will check if there are product updates available for Information Manager

If there is a new update, and the user hasn't previously been notified of it, then the Options screen will open automatically on the Updates tab and display details of the new updates.

> **Tip:** The "administrator" or "super user" or "owner" of Sage 300 should have this option
>
> turned on. All other users should have it turned off.

CHECK FOR UPDATES AND SUPPORT REQUESTS

You can use "`Check for Updates`" button to view the list of new features and fixes.

To facilitate support, please include the Version and Product Updates you are running when reporting any issues.

Updates are available to be downloaded from the partner area of the Orchid website Product downloads.

CONFIGURE TRAY ICON TO DISPLAY EXTENDER LOGS AND WORKFLOW

If you want to configure icons on Sage 300 screens to progress the workflow and to view workflow history, you need to configure Information Manager.

- Install and activate Information Manager for your version of Sage 300.
- Setup I/M Options for Extender Workflow. For details, Extender Workflow- Notes/DML/Extender Tray

In Information Manager, I/M Options > Notes/DML/Extender Tray


AUTOMATICALLY START THE NOTES/DML/EXTENDER

Select "Yes" for the "Automatically Start Notes/DML Tray" option

The Tray will automatically start for all Sage 300 users, using their currently logged on credentials.

In order for Notes or Documents to be displayed for the user, the tray icon needs to be running while the user is active in Sage 300 .

> **Note:** Individual Users can overwrite the Notes setup in the IM Transactions / Notes User Options. See details in Information Manager documentation
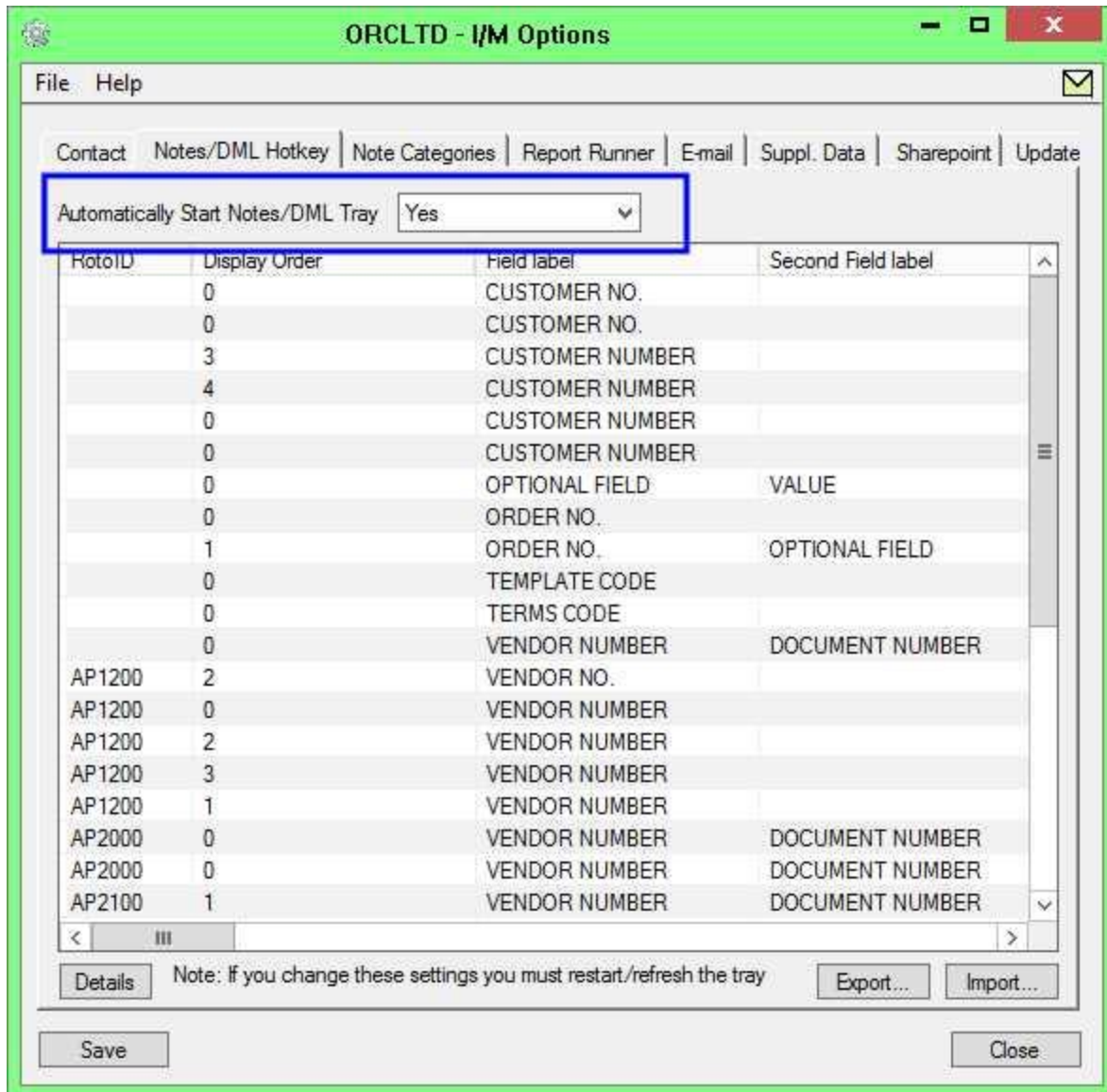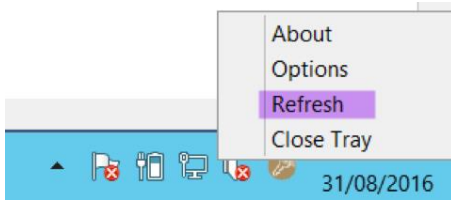
DISPLAYING THE TRAY ICON ON THE TASKBAR.

Depending on your workstation setup, you may need to customise the Notification Area Icons for the Tray icon to display on the Taskbar.

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.

Using Workflow Icons

To enable functionality in the Workflow Console, workflow icons and Extender Log icons, the logged on user needs to be set as a Workflow User.

Refer to Extender License and Workflow Users

> **Tip:** ADMIN is automatically configured as a Workflow User.

OPTIONS FORM - NOTES/DML/EXTENDER TRAY TAB

Options Form - Screen Guide on page 34

Use the Notes/DML/Extender Tray tab to configure the SharePoint integration, Network Folder Integration, InfoSets, notes or Extender Script.

This applies to Information Manager - Notes, Optional Tables and Document Management Link.

Alerts can either be driven from

- from an Infoset (if you require the notes to take the form of specific values- reference/comment/description from the Infoset - for a key value)
- from a Note (which are free-format rich text, hyperlinks to documents or websites, or pictures stored by date, time, user id for a key valuestored by date, time, user id for a key value)
- from SharePoint (which displays a filtered list of SharePoint documents from a specified folder in SharePoint)
- from a Network Folder (which displays a filtered list of files from a specified folder on the network
- from an Run Extender Script to populate Notes on page 42 (which displays data retrieved by an Extender Script. This option is only available when using the Orchid Extender module).

> **Note:** Alerts can now display on a Sage 300 data grid entry without the need for a custom screen.
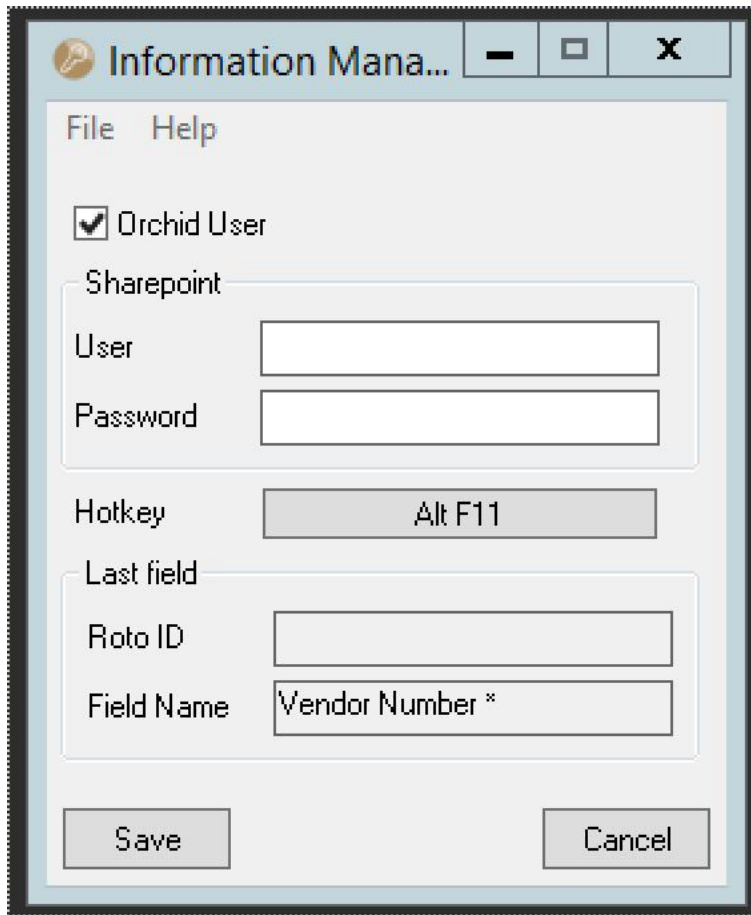
INFORMATION MANAGER HOTKEY SETUP

The Information Manager Hotkey (F11 by default) can be used to view Document and Notes that have not been configured to popup in the Alert Box.

When clicked on any Sage 300 screen it will show which Notes or Document Management Links have been configured for the active screen.(regardless of the Notes Alert method configured).

You can view the Information Manager Hotkey by right hand mouse clicking on the Information Manager Tray Icon (the key) and select Options.
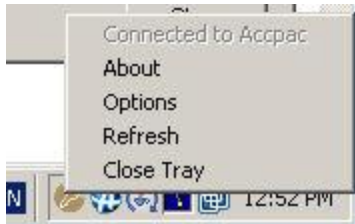
Hotkey – Define the HotKey required which can be clicked on any Sage 300 screen to show which Notes or Document Management Links have been configured for the active screen. If any other key than F11 (default) is required, click on the hotkey and click on the required key. Then Save the changes.
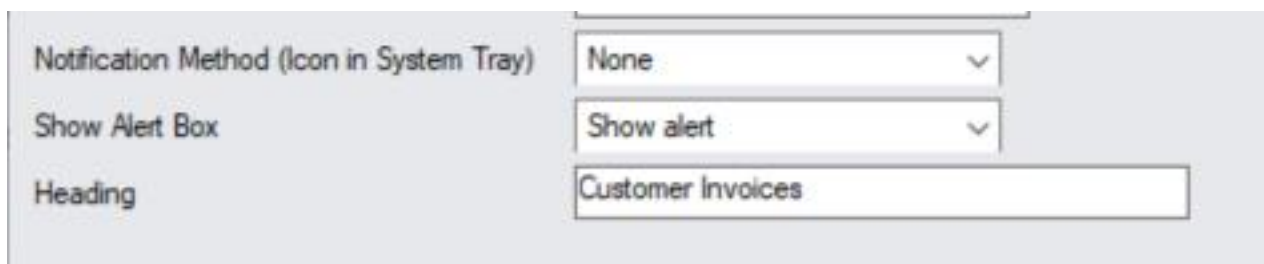
The tray is also used when setting up Notes and DML to identify the RotoID and the Field Label used on the screen.

NOTIFICATION AND ALERT CONFIGURATION (NOTES/DML/EXTENDER TRAY TAB)

This applies to all Notes/DML/Extender setup types.

Depending on the configuration, the Alert box and the Infoset Hotkey will behave differently.

Tip: Typically if you use the "Show Alert" you would have the Notification Method set as "None"

Notification Method (I/M Options)

This option refers to the Information Manager Tray icon in the System Tray.

It is configured in I/M Setup > I/M Options > Notes/DML/Extender Tray Tab.

Select one of the following notification methods for the user to be notified if a note exists :

- **None** – Choose if you want to use the alert box only
- **Change Tray Icon** – to force the tray icon to go red if notes exist for the screen.

  If there are any notes in the system relating to the open screen will display as

- **Blink Tray Icon** – to force the tray icon to go red and blink if notes exist for the screen
- **Automatically pop up** - to force the entry screen to open automatically . When used with an Info-set Note type, Open the associated data entry screen "Information Entry Grid" or "Information Entry" screen as configured in the "Open With Column".

  > **Note:** If the note/document is not configured to Automatically Popup, you can use the Hotkey (F11 by default) to bring up the Alert Box to view / add notes and documents for the field/screen selected.

Show Alert: Select how the alert will be shown

This option refers to the Alert Box that opens next to the Sage 300 screen.

Do not show alert : no alert box will be shown

Show Alert and fade out : the alert box will be shown on the screen for approximately 5 seconds and then fade out

Show Alert : the alert box will be shown on the screen until the user clicks "close" to close the Alert box

Heading

Alert Box Heading

Type the description you want to see before the values.

> **Note:** This setting exists only in Sage 300 v 2016 and above.

> **Note:** The Sage 300 ORGID and screen name are automatically included in the Alert Box heading.

NOTES USER OPTIONS

Use this form to set up Notes User Options if you want to override the default Information Manager Options for the specific user.

Notes/DML/Extender Tray Tab

The detail grid that is displayed is the same in Setup Options on the Notes/DML/Extender Tray Tab.

The user may override the options setup on the Notes/DML/Extender Tray Tab tick the box "Use the settings below for me instead of the standard settings".

> **Tip:** When you change the configuration I/M Options, the user specific configuration are not updated. When troubleshooting changed configuration in I/M Options, it is recommended to check the user settings.

RUN EXTENDER SCRIPT TO POPULATE NOTES
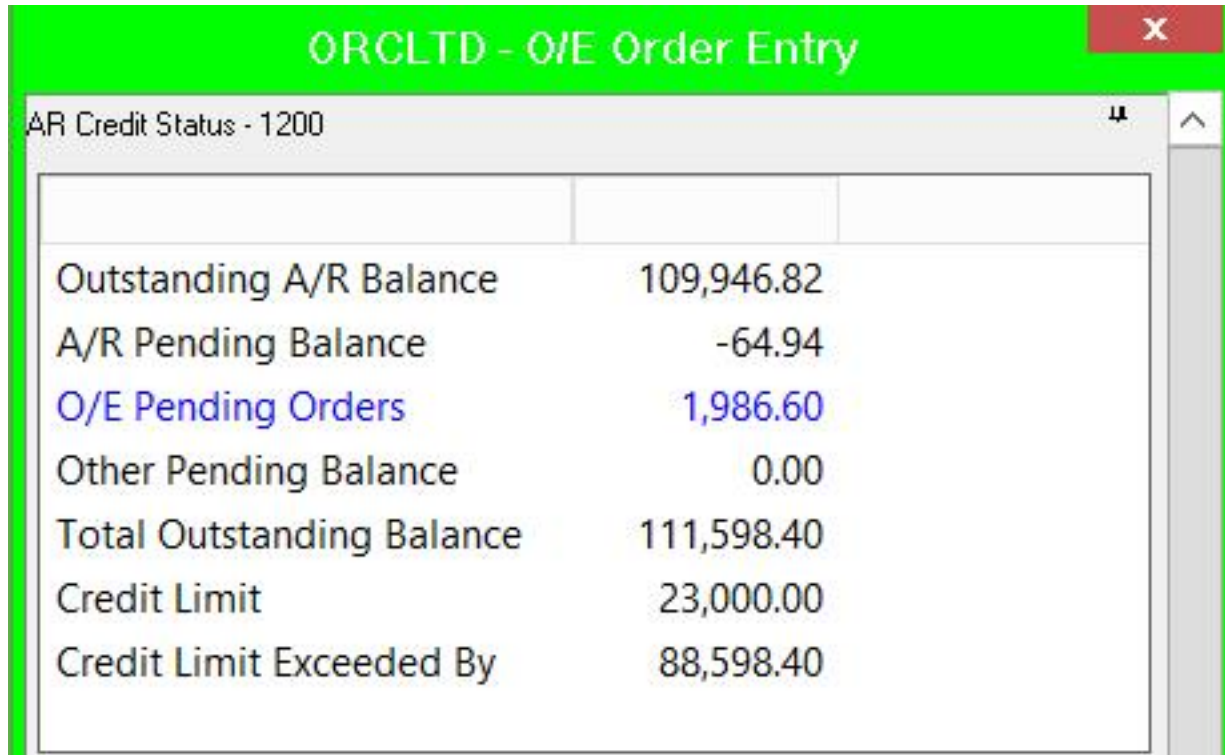
In addition to displaying an Infoset, a Note, a Network Folder or a SharePoint library, there is a new "Type" of information to be displayed in the Tray Alert : Extender Script for organisations who are using Orchid Extender module.

Using an Extender script you can retrieve data from anywhere and display it in the Tray Alert.

4 Sample scripts provided display

1. AR Credit Status from the AR Inquiry Screen.

Drill Down is enabled on the O/E Pending Orders, double clicking on it will open up a list of the Outstanding Sales Orders. Double clicking again on any one of the Outstanding Sales orders will open up the OE Order Entry Screen showing the details of the individual order.

Double Click on O/E Pending Orders 1,986.60

Double Click on ORD00000000064

2. AR Aging from the AR Customer Inquiry.

There is drill down into the transactions making up the aged buckets, and drill down into the AR batch for open transactions

Double click on Current and the documents that make up the 109,946.82 will be shown

ORCLTD - O/E Order Entry

AR Credit Status - 1200

Outstanding A/R Balance	109,946.82	
A/R Pending Balance	-64.94	
O/E Pending Orders	1,986.60	
Other Pending Balance	0.00	
Total Outstanding Balance	111,598.40	
Credit Limit	23,000.00	
Credit Limit Exceeded By	88,598.40	

AR Aging - 1200

Transaction Ty…	Document No.	Transaction D…	Amount
Invoice	TR-INV-003	1/01/2019	105,96
Invoice	TR-CRE-006	2/02/2019	26
Credit Note	CN00000000…	4/01/2020	-12
Receipt	PY000000000…	3/04/2020	-21
Invoice	IN1832	1/06/2020	40
Receipt	PY000000000…	1/06/2020	-62
Prepayment	PP000000000…	15/06/2020	-5
Credit Note	CR00000000…	30/06/2020	-4
Invoice	IN000000000…	30/06/2020	1,62
Invoice	IN000000000…	1/07/2020	2,33
Invoice	IN000000000…	30/07/2020	40

Double click on any one document (eg IN1832), and the AR Invoice Entry will be shown

with the configured AR Invoice Entry notes

3. AR Comments from the AR Customer Inquiry.

If the reminder date is in the past, the comment will be coloured Red.

4. OE Incomplete Sales Orders or "backorders".

Double clicking on any of the order number will open up the OE Sales Order Entry with the selected document.

ORCLTD - O/E Shipment Entry

ORCLTD Contracts - 1200

Deliveries to the back of the building - Little Alfred Street (although the address is Alfred Street.

Please ensure all deliveries are flagged "leave at reception"

ORCLTD Credit Limit - 1200

The credit limit for customer 1200 Mr. Ronald Black has changed from 27000.000 to 23000.000.

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

Date : 12/08/2016
Time : 06:07:59

Backorders - 1200

Order Number	Order Descr...	Expected S...	Purchase Or...	Order Total
ORD000000000001	Please ship ...	15/01/2019		884.02
ORD000000000064		1/07/2020		0.00
ORD000000000065		1/07/2020		0.00
ORD000000000067		25/02/2016		0.00
ORD000000000069		4/04/2016		401.55
ORD000000000070		16/04/2020		0.00
ORD000000000073		16/04/2020		270.08
ORD000000000074		16/04/2020		0.00
ORD000000000075		16/04/2020		366.01
ORD000000000076		16/04/2020		64.94

OrchidSystems
SYDNEY | AUSTRALIA

Office: 2/273 Alfred Street, North Sydney
New South Wales 2060 Australia

Phone: +61 2 9099 1077
Email: info@orchid.systems

www.**orchid**.systems

Sage Tech Partner

Work *smarter* with Orchid