



# Document Management System For Sage 100 2017

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## Installation Instructions and Cautions

**PLEASE NOTE: SAGE 100** must already be installed on your system before installing any IIG enhancement. If not already done, perform your SAGE 100 installation and setup now; then allow any updating to be accomplished automatically. Once SAGE 100 installation and file updating is complete, you may install your IIG enhancement product by following the procedure below.

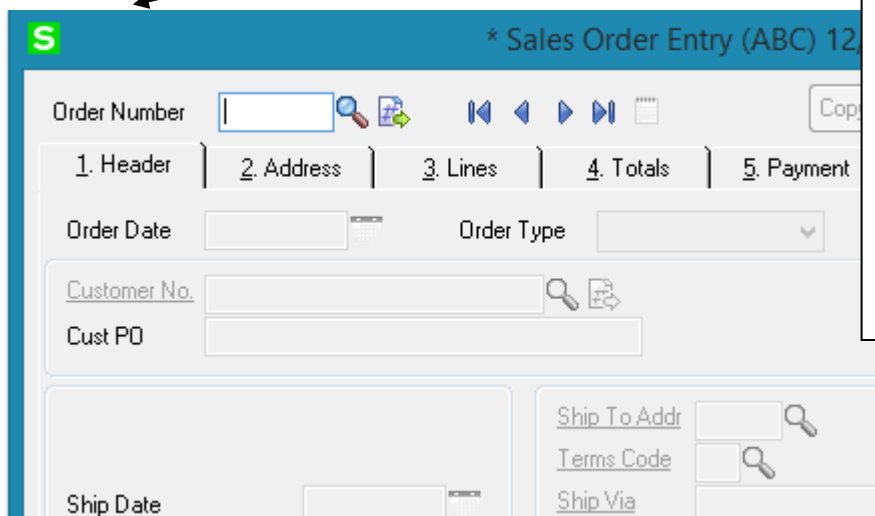
### Wait! Before You Install – Do You Use CUSTOM OFFICE?

**THIS IS AN IMPORTANT CAUTION:** If you have Custom Office installed, **and** if you have modified any SAGE 100 screens, you must run **Customizer Update** after you do an enhancement installation.

**But wait! BEFORE** you run **Customizer Update**, it is very important that you **print all of your tab lists**. Running **Customizer Update** will clear all Tab settings; your printed tab list will help you to reset your Tabs in Customizer Update. **Custom Office** is installed on your system if there is an asterisk in the title bar of some of the screens. The asterisk indicates that the screen has been changed.

An **asterisk** in a window's title bar indicates that the screen has been modified. This means that **Custom Office** is installed.

Follow all the instructions on this page before you run **Customizer Update!**



## Registering IIG products

IIG Enhancement should be registered to be able to use it. If registration is not performed, the enhancement will work in a demo mode for a limited time period. The registration can be still done during the demo period.

Select the **IIG Product Registration** program under the **Library Master Setup** menu of the SAGE 100.

If this option is not listed under the Library Master Setup menu, go to the main menu, and select **Run** from the **File** menu. Type in SVIIGR and click **OK**.

Enhancement	Level	Release Date	Serial Number	Unlocking Key
IIG Enhancement	5.40		AAAAAAAAAAAAAAAAAA	BBBBB

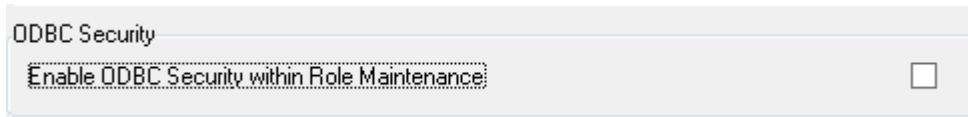
Enter **Serial Number** and **Unlocking Key** provided by IIG, and click **OK**.

If multiple IIG Enhancements are installed, Serial Numbers and Unlocking Keys should be entered for each enhancement.

Use the **Print Registration Form** button to print IIG Registration Form.

## ODBC Security

After installing an **IIG Enhancement**; it is **very important to verify** whether or not the **Enable ODBC Security within Role Maintenance** check box is selected in the **System Configuration** window of your system. If it is selected you must assign ODBC security permissions and allow access to custom data tables/fields for the Roles defined in your system.

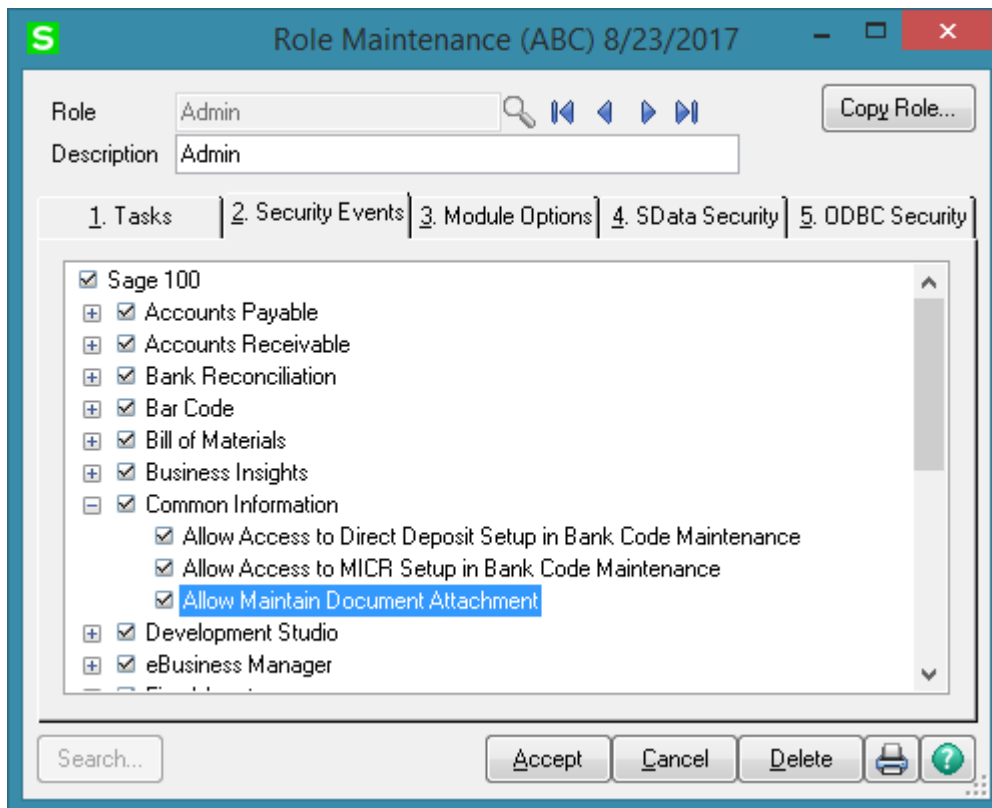


## Document Attachment

Open the **DocumentAttachmentPackage** and run the **Setup.exe** to install and register some DLL(s) and OCX(s) needed for Document Attachment functionality. Follow on-screen instructions for installation. A prompt appears if some DLL or OCX files being installed during this installation are older than the ones existing in your system. Select **Yes** to keep your system DLL files. You may have to do this a number of times.

### Role Maintenance

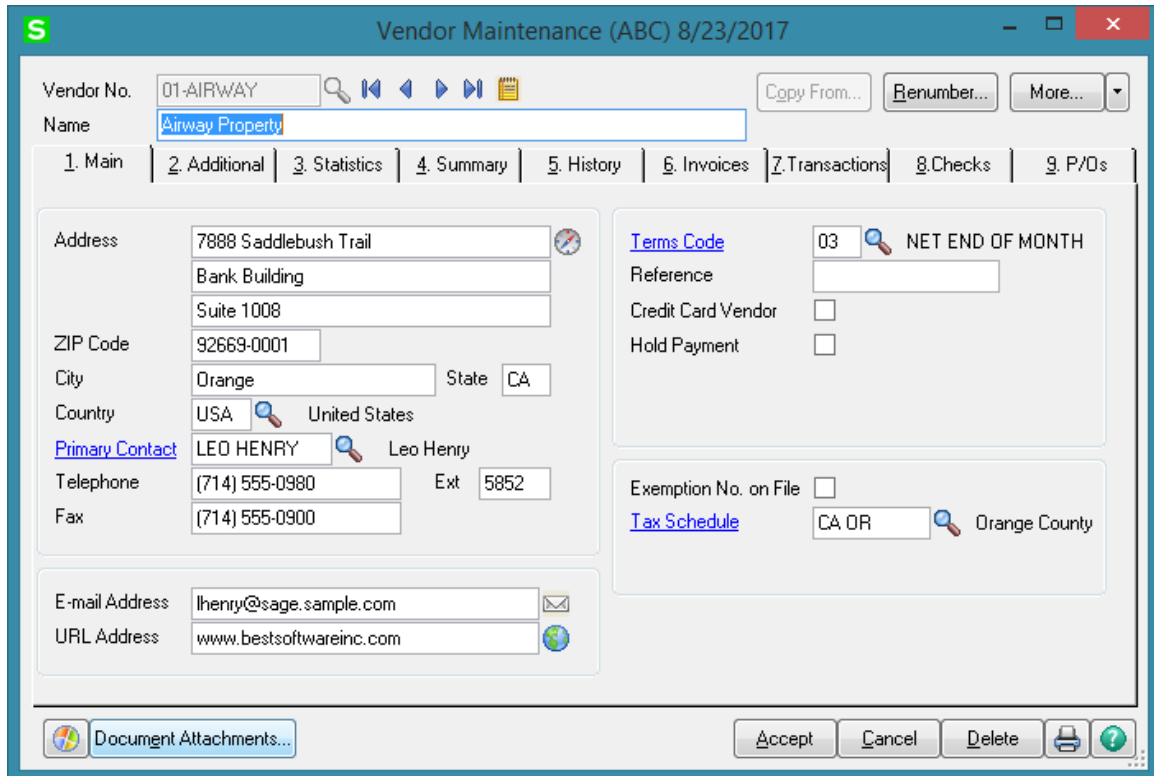
The **Allow Maintain Document Attachment** security event has been added in the Role Maintenance to allow only authorized users to add, open and delete documents from the documents (Files) list.



If this security event is enabled for a user's role, the user can add, open and delete files from the documents list.

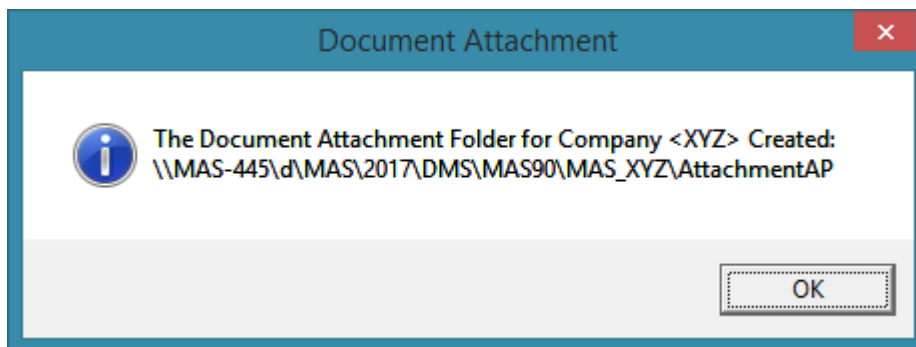
## Vendor Maintenance

The **Document Attachment** button has been added on the Vendor Maintenance to allow opening document attachment list for current Vendor and adding any type of file to that list by drag & drop with the mouse.



Upon pressing the Document Management button the program looks for respective “Attachment” folder under the MAS\_XXX (where XXX is Company Code) folder. If such folder already exists the Files List window is opened allowing the user to add files to the list for current Vendor.

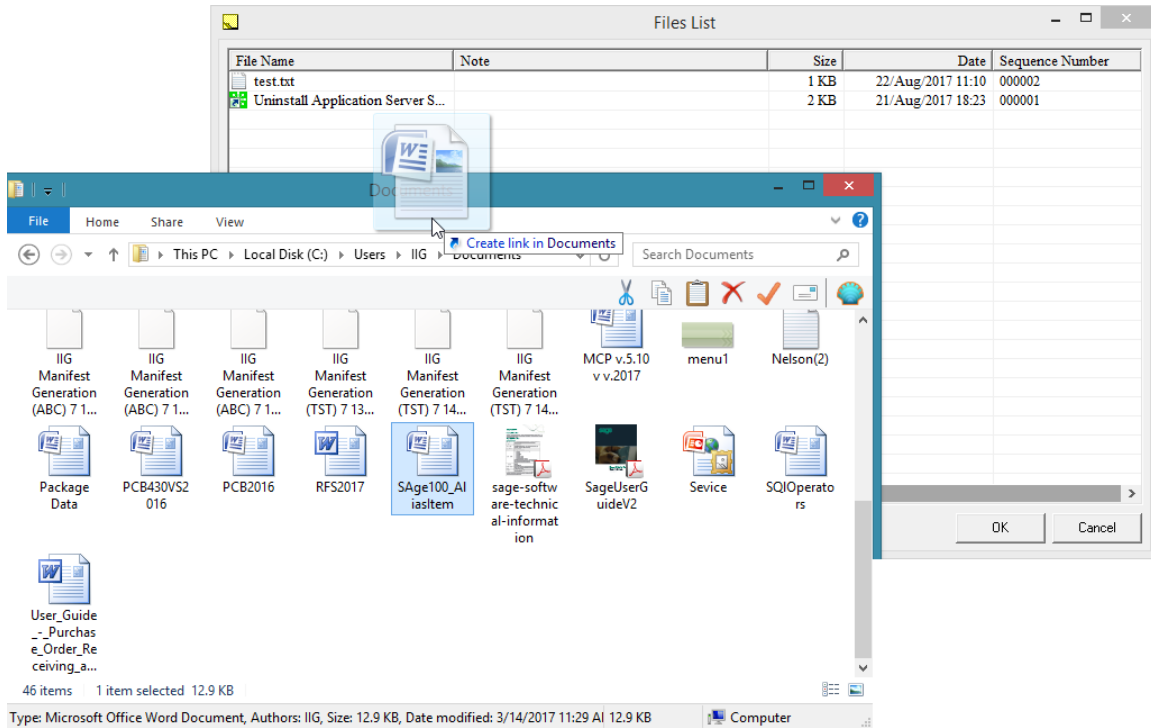
If no attachment folder is found, the user is prompted about the folder created automatically:





In the opened Files List the user may add any type of files just by opening respective folder and drag & drop a file by mouse.

The newly added files are displayed in blue:



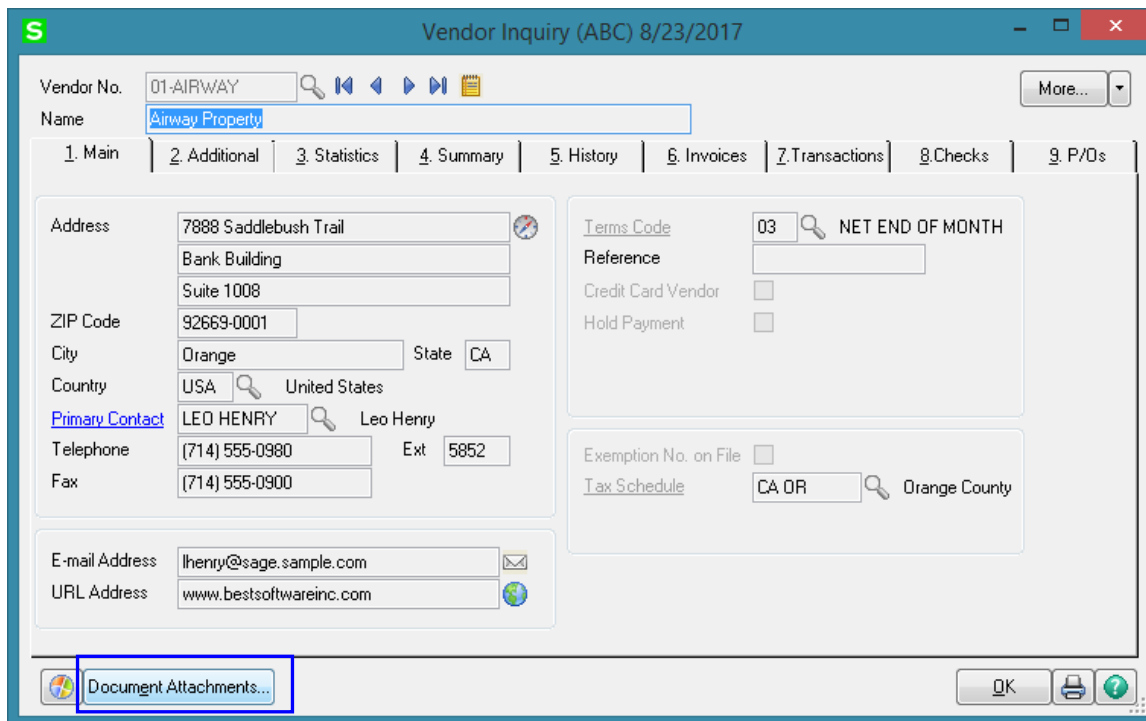
The user may enter notes (up to 50 characters) for each line in the Note column. F2 functional key is used for editing notes.

Delete button is popup upon right clicking on a line. The user having respective permission may delete the attached file from the Files List. If a file once added in the list is no longer found in the attachment folder, the file name becomes red colored in the Files List.



Vendor Inquiry

The **Document Attachments** button is available also in the Vendor Inquiry.



Here the user cannot add or delete a file from the documents list.

## Customer Maintenance

The Document Attachments button has been added on the Customer Maintenance to allow opening document attachment list for current Customer and adding any type of file to that list by drag & drop with the mouse.

The screenshot shows the 'Customer Maintenance' window for customer 'American Business Futures' (ID: 01-ABF) as of 8/23/2017. The interface includes a top navigation bar with tabs for Main, Additional, Statistics, Summary, History, Invoices, Transactions, and S/D's. The main area is divided into several sections:

- Address:** 2131 N. 14th Street, Suite 100, Accounting Department, ZIP Code 53205-1204, City Milwaukee, WI, Country USA.
- Contact Info:** Salesperson: 0100 Jim Kentley; Telephone: (414) 555-4787; Ext: 219.
- Terms & Conditions:** Terms Code: 01 (Net 30 Days); Primary Contact: ARTIE JOHN (Artie Johnson); Ship Code: UPS BLUE; Primary Ship To: 2 (American Business Future).
- Tax Schedule:** WI MILMIL (Milwaukee), with an Exemptions... button.
- Credit Info:** Credit Hold: ; Credit Limit: 120,000.00.
- Other Info:** E-mail Address: artie@sage.sample.com; URL Address: www.abf.com.

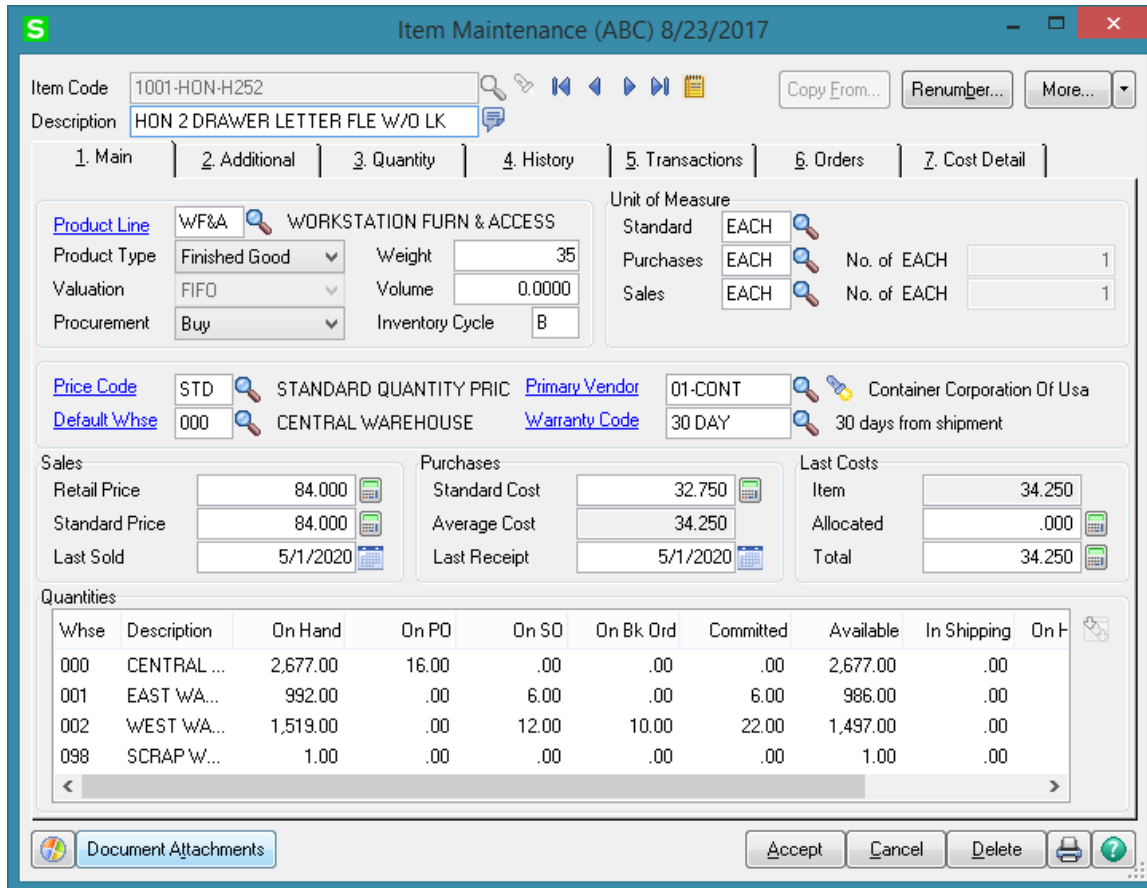
At the bottom left, a new 'Document Attachments...' button has been added. At the bottom right, there are buttons for 'Accept', 'Cancel', 'Delete', and a printer icon.

The documents attachment process is similar the one described for Vendor Maintenance.



**Item Maintenance**

The **Document Attachments** button has been added on the Item Maintenance to allow opening documents attachment list for current Item and adding any type of file to that list by drag & drop with the mouse.

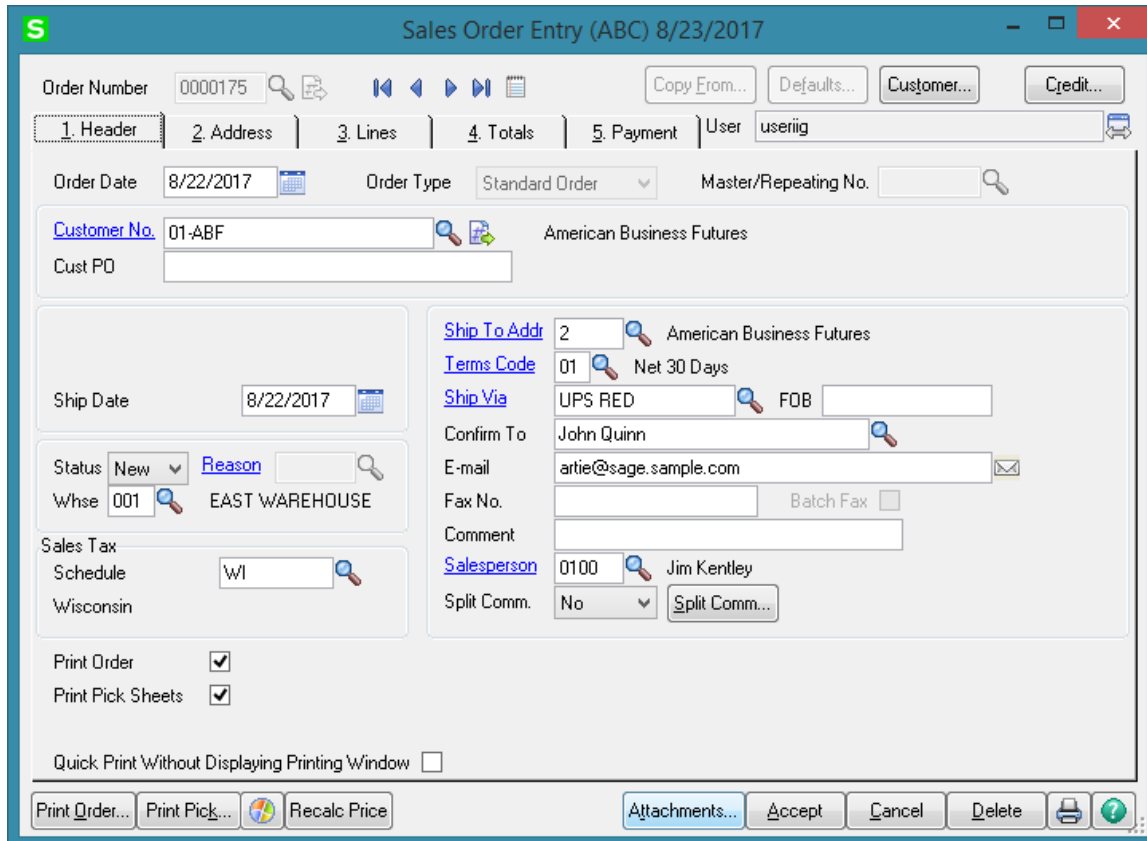


The Documents attachment for Items functions same way as described above for Vendor Maintenance



Sales Order Entry

The **Attachments** button has been added on the Sales Order Entry to allow opening documents attachment list for current Sales Order and adding any type of file to that list by drag & drop with the mouse.





File Name	Note	Size	Date	Sequence
20170518_132729.jpg		854 KB	18/May/2017 18:27	000002
42utilitymanual_final.pdf		289 KB	25/Apr/2017 10:01	000001
Avatax.bmp		803 KB	15/May/2017 15:03	000003
SOquote.xps		113 KB	08/Dec/2016 09:03	000004

The Attachment button is available also on the Purchase Order Entry.

Documents Attachment list can be viewed for respective entry from **Item Inquiry**, **Customer Inquiry**, **Sales Order Inquiry**, **Sales Order Quote/History Inquiry**, **Purchase Order Inquiry** and **Purchase Order History Inquiry**.

All attachments are stored in the "CI068\_DMSDocumentAttachment" table.

*Note: Attachment of different files but with the same name to several entries is not supported.*