

# Document Management for Sage 300 ERP Product Update



The Document Management for Sage 300 ERP Product Update contains a modified version of one or more document management program components.

## Product Update 1 new features and enhancements

The following sections describe new features and feature enhancements that has been included in Product Update 1 for DMS 5.6A. DMS 5.6A with Product update 1 is fully compatible with Sage ERP Accpac 5.6, Sage ERP Accpac 6.0 and Sage Accpac 6.1 (Sage 300 ERP 2012).

### Drag and Drop Files

This update allows users to drag and drop files onto the attach document screen, this feature is available in all DMS screen.

### Drag from Outlook Directly Into DMS

This update allows users to drag emails from outlook and drop it into DMS attach screen, this feature is available in all DMS screens.

### Email Documents Directly from DMS

This update allows users to email documents stored in the DMS modules, this feature is available from the view document and manage document screens.

### AP Invoice Description Defaults

The AP invoice description is defaulted to the DMS document description in both attached and scanned document screens. This saves users from re-entering the description.

### DMS Support for RMA

This update allows users to have DMS features on the RMA screen, The DMS RMA screen is under DMS Order Entry module and is licensed as part of DMS order entry, which does not require an additional DMS for RMA license.

## Product Update 1 Program Fixes

The following sections describe program fixes included in Product Update 1:

- Fixes the issue of opening customer activity screen when OE module is not activated.
- Fixes the search screen of AP vendors and IC items
- Fixes the issue on DMS - GL batch list when new batch used to be created and the first entry was not editable
- Fixes the issue on DMS - AP Invoice batch list when new batch used to be created it use to default to entry no 2
- Fixes the issue on DMS - AP Payment batch list when new batch used to be created it use to default to entry no 2
- Fixes the issue on DMS - AR Invoice batch list when new batch used to be created it use to default to entry no 2



## Installing Product Update 1

The Product Update contains the full DMS installation. If existing, the current DMS software will need to be uninstalled prior to installing DMS Product Update 1.

- 1) First backup the “web.config” file under `Inetpub\wwwroot\DMS`
- 2) Then using windows add/remove feature remove the **Visionetix Software – Document Management System 5.6A** and **Visionetix Software – Document Management System server**
- 3) Run the `DMS56_Product_Update_1_Setup.exe` installation package, at the end of the installation it will prompt to install the DMS server and to upgrade the DMS Database.
- 4) Copy from backup the Web.config file into `Inetpub\wwwroot\DMS` or re-enter the DMS database connection details from the DMS setup screen
- 5) To configure emailing for DMS, login to Sage Accpac and go to DMS setup and select “Configure email” in this screen enter the DMS database server, DMS database (DMS\_DAT) and SQL user name and password. You can also enter the default email template.

### Important:

This product update contains database changes to allow new DMS features in RMA Module, after installation of the Product update 1 the DMS database schema will need to be updated. This can be done at the time of installation or by manually running the “`DMSDatabaseSetup.exe`” from the VX56A folder. The existing DMS database should be backed up first.

## Visionetix Software

**For more information:** Visit our website at [www.visionetix.com](http://www.visionetix.com) for brochures, downloads and support.

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