

Cheat Sheet – Document Attachment Applets

SYSTRONICS Addons For Sage 300

Sales Proposition

Manage Electronic Documents And Images Inside Sage 300!

Overview

SYSTRONICS Document Attachment Applets for Sage 300 enable attaching electronic documents, formatted text and optional fields to a wide range of Sage 300 transactions and records. Examples include but are not limited to attaching scanned documents to Sage 300 Invoices, product images to I/C Items, etc.

Data captured by Applets is encapsulated in Sage 300 databases and is archived along with data backups.

Qualification Questions

- Do you want to reduce the amount of paper and space used to print and store photocopies of documents, e.g. signed invoices and orders, custom clearance documents, etc.?
- Do you want to incorporate your electronic document management system into Sage 300, so that complete information is available directly from corresponding Sage 300 transactions?
- Is the maximum length of 60 characters field length available in Sage 300 not sufficient for capturing information in Sage 300 transactions?
- Do you want to attach formatted text to your Sage 300 records, e.g. specification sheets, safety instructions, industry requirements, contract documents, etc.?

Why SYSTRONICS Document Attachment Applets?

- Offers an affordable but highly effective document management solution.
- Allows storing attachments optionally inside Sage 300 databases, or on network drives or on SharePoint.
- Supports 255 character-long text fields, as opposed to the standard maximum 60 characters available in Sage 300.
- Supports combining fields in Sets and Groups to better visualize the captured information and to ease data management.
- Allows attaching information to Sage 300 transactions retrospectively, even after posting them.

Business Problems Solved

- Time and cost associated with the filing of Sage 300 related paper documents are reduced significantly.
- Information attached to Sage 300 transactions is readily accessible.

Customer Stories

Profile 1: Governmental Organization.

Business Problem: The newly appointed Chief Accountant was overloaded with the task of filing a large number of paper documents, as well as the efforts required for archiving and retrieving document copies. She set herself a target to reduce paperwork to a minimum.

Solution: She looked for a tool that would allow attaching electronic images and documents, such as forms, scanned receipts, signed invoices, written approvals, etc., to Sage 300 transactions. After a thorough investigation, she purchased six Document Attachment Applets to facilitate this process.

Results: The paper-based document filing system is now fully digitized and incorporated into Sage 300, making data well organized and easily accessible. Paper consumption and time spent on printing copies have reduced significantly. In fact, an effective document management system is now in place at a fraction of the industry average cost.

Profile 2: Digital Printing Company.

Business Problem: The company had to enter long descriptions for project requirements in each Quote or Sales Order, so that the production team could have enough information later while producing them. The standard maximum sixty characters available in Sage 300 fields were not sufficient to capture the necessary information.

Solution: Deploying the O/E Order Applet with its support for 255 character long text fields addressed this issue.

Results: The necessary details are now entered during order entry. The sales and accounting teams no longer waste time in splitting and entering project descriptions in multiple fields or use emails and notes to communicate these requirements to the production team.