EDMImport for Sage X3

EDMImport is the new way to archive yours transactions or add file attachments to them, all from within Sage X3 and without the need to install any software.

No need to remember codes, see pop ups or wait for status screens, in a couple of clicks you can archive your image and EDM does the rest.

How does it work?

During the installation, a number of links are added to your screens, they only take a few minutes to setup and are ready to go, no extra 'code' is needed to activate them.

When your image is sent to the V1 server for processing, a background task takes care of the archiving

[EDM] Archive Transaction

This link allows you to archive a copy of the actual *transaction* you may have, perhaps as a PDF or scan on your PC / on your phone / tablet. There are 20 supported Sage objects out the box you can use and more can be added at any time.

[EDM] Archive Attachment

This link archives any *attachments* you may have that relate to the transaction, such a photo, email, letter and so on, again from a scan on your PC / on your phone / tablet. All 20 out the box transactions can have attachments against them.

How do I use it?

Click here to see a How2Use guide on EDMImport, but an example is below:

Examples:

- Let's assume you're creating a quote in Sage for your customer and have a PDF copy ready to go on your PC. Click the **[EDM] Archive Transaction** link, browse to the PDF or drag and drop it over the window, then click OK.

  After a few seconds the PDF is then available to see via the [EDM] View Transaction link.

- The quote is for an iPad and you've taken a photo of the box for reference purposes and saved it on your phone. Navigate to Sage, go to the same quote you archived the transaction for, click the **[EDM] Archive Attachment** link and select your photo.

  After a few seconds, it's available via the **[EDM] View Attachments** link

- Both the transaction and attachment are linked together and you can flip seamlessly between them within the SmartRetrieve browser window.

  It really is that simple!

Get in touch about how V1 can benefit your business
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