



SmartDeposit - EDM for Sage X3

What is it used for?

SmartDeposit is used to archive pre-existing files supported by the EDM solution against any Sage X3 transactions or as attachments to those transactions.

Once archived, these files are viewable either via the Sage X3 interface, or using the external viewer for users who do not have access to Sage X3.

How do I use it?

Navigate to <http://YOURSERVER:5002> and login to the portal (replace YOURSERVER with the actual url of your V1 installation)

Login and once authenticated, click the on the icon for SmartDeposit.

- Browse to the image you want to archive on your PC / phone / tablet
- Select the EDM table to deposit an image against:
 - If for a transaction:
 - Confirm the Endpoint
 - Enter the transaction number as it appears in Sage X3
OR
 - Enter a * followed by a few characters of the transaction number to perform a wildcard search. Click the lookup button on the top right hand side to return a list matching your search. Select from the list.
 - Press the lookup button in the top right hand corner
 - The data is returned, when ready, click the deposit document button also in the top right hand corner
 - If for a Transactional Attachment:
 - Confirm the Sage Endpoint
 - Select the type of transaction to attach to
 - Enter the transaction number applicable to the transaction type
 - Press the lookup button
 - The data is returned, enter an optional Description for the attachment
 - When ready, click the deposit document button also in the top right hand corner
 - If for a Supplier / Customer / Product
 - Enter the Supplier / Customer / Product number as it appears in Sage X3 (or search for the number by starting with a * wildcard) and press the lookup button in the top right hand corner
 - Enter an optional description for the attachment
 - The data is returned, when ready, click the deposit document button also in the top right hand corner

What else is new for EDM for Sage X3?

- Browser based interface using the latest technology
- ALL document types listed Smart Deposit can now be used to attach images to your Sage X3 transactions
- All tables prefixed with the same 3 character object code than Sage X3 making them easier to identify and use

