DbDeposit for EDM for Sage X3 by V1

What is it used for?

The DbDeposit client is used to archive pre-existing files supported by the EDM solution to 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?

Load the DbDeposit client and log in once you have been added as a user:

- Either drag and drop your file / email over the DbDeposit interface or browse for your file
- Select the DbArchive table to deposit in to:
    - If for a transaction, select the Sage X3 Folder / Endpoint patched for EDM
        - Enter the transaction number as it appears in Sage X3 and press the lookup button
        - The data is returned, click the green tick and your image is archived against the Sage X3 transaction
    - If for a transactional attachment, select the Sage X3 Folder / Endpoint patched for EDM
        - Select the type of transaction to attach to
        - Enter (or search for the transaction number by starting with a * wildcard) and press the lookup button
        - Confirm the Sage X3 transaction number and again, press the lookup button
        - The data is returned, click the green tick and your image is archived as a linked attachment against the Sage X3 transaction
    - 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
        - Enter an optional description for the attachment
        - Click the green tick and your image is archived as a linked attachment against the Sage X3 Supplier / Customer / Product

What else is new for Release 12.1?

Thanks to the feedback from customers and partners, Release 12.1 also includes as standard:

- ALL document types listed in the DbDeposit client can now be used to attach images to your Sage X3 transactions (6 more than R11.1)
- All tables now include fields for Company, Site and Type
- The all new Transactional Attachments table means Sage X3 transactions can have a linked document
    - All document types in the Transactional Attachments table can be independently searched for using the * wildcard

Get in touch about how V1 can benefit your business
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