Document Distribution (EDD) with EDM for Sage X3 by V1

Document distribution (EDD) using EDM for Sage X3 by V1 allows Sage X3 transactional documents be emailed, faxed or printed directly from screen. As well as being distributed, the same transaction is also archived and then accessible via the Paperclip icon or button / link on screen.

How do I use it?

The standard Sage X3 reports for the supported transactions have been copied and uniquely identified suffixed with the word AUTO, so taking Sales Invoices as an example, when printing you will be presented with the usual SBONFAC report and in addition, SBONFACAUTO.

When you select SBONFACAUTO, the default Sage X3 destination is AUTO (meaning automatic), so the following logic is applied:

- Is there an email address for this supplier?
    - If there is, the document is emailed to this address and archived
        - If not, a check is done if fax is licensed for, if so and a fax number is present for the supplier, the document is faxed and archived
            - If there is neither an email address nor fax number, the document is archived and printed.

Every report for each of the supported transactions suffixed AUTO has its default destination set as AUTO. However, EDM for Sage X3 by V1 Release 12.1 introduces more specific methods for distribution using the same report.

Print to the SBONFACAUTO, but change the destination to any of the following and out the box the following logic is applied:

- Printing to SBONFACAUTO report and the destination is changed to EMAILONLY
    - If there is an email address for the supplier, the transaction is emailed and not archived
        - If there is no email address, the document is printed and not archived
- Printing to SBONFACAUTO report and the destination is changed to EMAIL
    - If there is an email address for the supplier, the transaction is emailed and archived
        - If there is no email address, the document is printed and archived
- Printing to SBONFACAUTO report and the destination is changed to FAXONLY
    - If there is a fax number for the supplier, the transaction is faxed and not archived
        - If there is no fax number, the document is printed and not archived
- Printing to SBONFACAUTO report and the destination is changed to FAX
    - If there is a fax number for the supplier, the transaction is faxed and archived
        - If there is no fax number, the document is printed and archived
- Printing to SBONFACAUTO report and the destination is changed to PRINTONLY
    - The transaction is printed faxed and not archived
- Printing to SBONFACAUTO report and the destination is changed to PRINT
    - The transaction is printed and archived

So as a final example, we have created a Sales Invoice T910911000002 and want to just email it the supplier Mace Supplies. Click Print, select SBONFACAUTO, change the destination to EMAILONLY, and click OK.

This powerful flexibility means no matter how the transaction is to be distributed whether singularly or in batch, EDM for Sage X3 by V1 allows you to control precisely how your BP's receive their documents.

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