



Enclosures for EDM for Sage X3 by V1

What is it used for?

The standard Enclosure functionality allows images to be associated with Supplier (GESBPS) which is a type of V1BPS, Customer (GESBPC) which is a type of V1BPC or Product Item (GESITM) which is a type of V1ITM.

NOTE: This can be extended to use any transactional document type.

NOTE: Users are encouraged to use the DbDeposit client which gives more flexibility than the Enclosures function. Enclosures will be deprecated in future releases.

How do I use it?

Let's assume you have a PDF file you wish to attach to a supplier, for example GBPGB011
Log in to the Sage X3 Client / navigate to the Sage X3 PU8 / PU9 / V11 home screen
Select Common Data > BPs > Suppliers (GESBPS) and select GBPGB011
Click the paper clip icon / link at the top / at the right hand side of the screen and select Enclosures then click OK

- For V6
 - Double click in the first cell in the table (Type) and enter V1BPS
 - Press tab to move to the next entry cell. (Supplier Archive should be populated for you)
 - Right click in the Document Name cell and select Archive file ...
 - Browse to the PDF you wish to attach to the supplier GBPGB011, select it and click OK
- For PU8 / PU9 / V11
 - Click the icon to right of the magnifying glass on the View cell
 - Click Archive File ...
 - Drag and drop / click select and upload your file, wait until it states File uploaded successfully, then click OK
 - Press tab to move to the next entry cell and enter a Type of V1BPS, press tab again (Supplier Archive should be populated for you)
 - Press OK

In all cases, a 'Before archiving' window will appear showing basic details about the Supplier. When satisfied, click OK

When the document is archived and validated, the remaining fields will be populated. Status will change to after archiving. This indicates that the archiving enclosure process has been successful.

What else is new for Release 12.1?

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

- Out the box compatibility with Sage X3 PU9 / V11
- All tables now include fields for Company, Site and Type

