



Information Integration Group, Inc.

# Share Point Document Management For Sage 100 ERP

457 Palm Drive  
Glendale, CA 91202  
818-956-3744  
818-956-3746  
sales@iigservices.com

[www.iigservices.com](http://www.iigservices.com)

The Sage logo features the word "sage" in a lowercase, green, sans-serif font.

Development Partner

**GOLD**

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## **TRADEMARKS**

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## Installation Instructions and Cautions

**PLEASE NOTE: SAGE 100 ERP** must already be installed on your system before installing any IIG enhancement. If not already done, perform your SAGE 100 ERP installation and setup now; then allow any updating to be accomplished automatically.

Once SAGE 100 ERP installation and file updating is complete, you may install your IIG enhancement product by following the procedure below.

### **Wait! Before You Install – Do You Use CUSTOM OFFICE?**

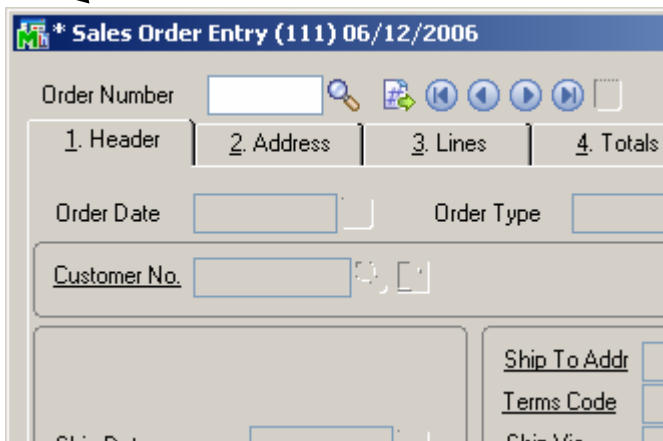
**THIS IS AN IMPORTANT CAUTION:** If you have Custom Office installed, **and** if you have modified any SAGE 100 ERP screens, you must run **Customizer Update** after you do an enhancement installation.

**But wait! BEFORE** you run **Customizer Update**, it is very important that you **print all of your tab lists**. Running **Customizer Update** will clear all Tab settings; your printed tab list will help you to reset your Tabs in Customizer Update.

**Custom Office** is installed on your system if there is an asterisk in the title bar of some of the screens. The asterisk indicates that the screen has been changed.

An **asterisk** in a window's title bar indicates that the screen has been modified. This means that **Custom Office** is installed.

Follow all the instructions on this page before you run **Customizer Update!**



## Registering IIG products

IIG Enhancement should be registered to be able to use it. If registration is not performed, the enhancement will work in a demo mode for a limited time period. The registration can be still done during the demo period.

Select the **IIG Product Registration** program under the **Library Master Setup** menu of the SAGE 100 ERP.

If this option is not listed under the Library Master Setup menu, go to the main menu, and select **Run** from the **File** menu. Type in SVIIGR and click **OK**.

Enhancement	Level	Release Date	Serial Number	Unlocking Key
IIG Enhancement Name	4.50		AAAAAAAAAAAAAAAAAA	BBBBB

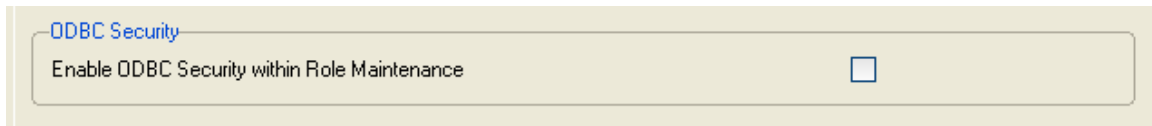
Enter **Serial Number** and **Unlocking Key** provided by IIG, and click **OK**.

If multiple IIG Enhancements are installed, Serial Numbers and Unlocking Keys should be entered for each enhancement.

Use the **Print Registration Form** button to print IIG Registration Form.

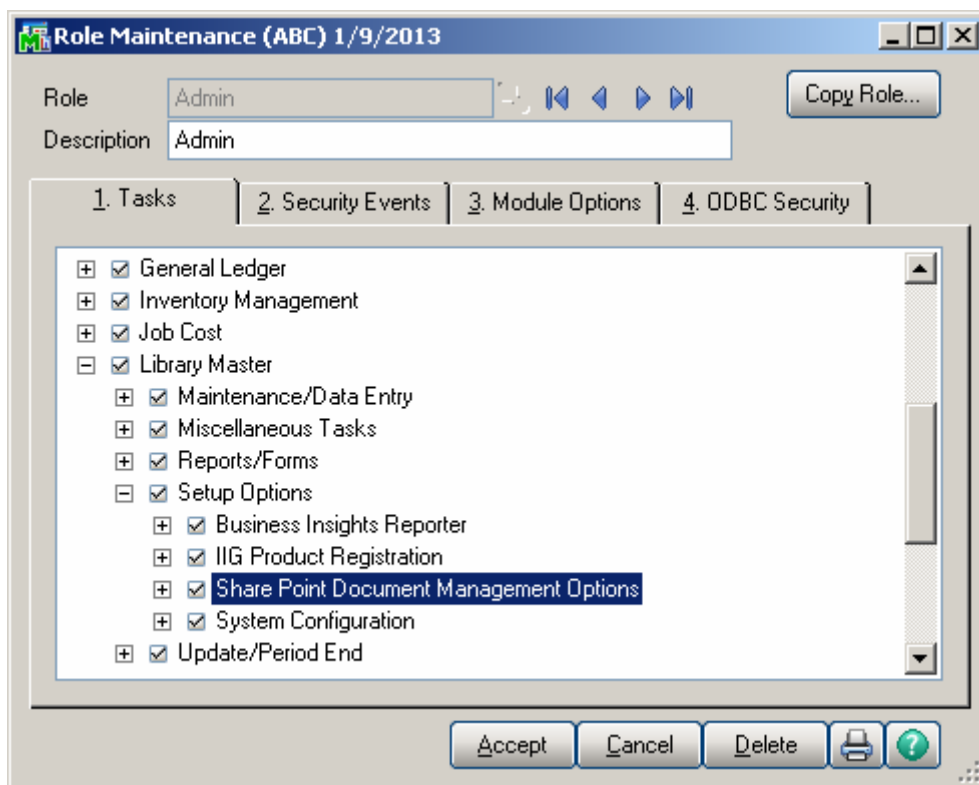
## ODBC Security

After installing an **IIG Enhancement**; it is **very important to verify** whether or not the **Enable ODBC Security within Role Maintenance** check box is selected in the **System Configuration** window of your system. If it is selected you must assign ODBC security permissions and allow access to custom data tables/fields for the Roles defined in your system.



## Role Maintenance

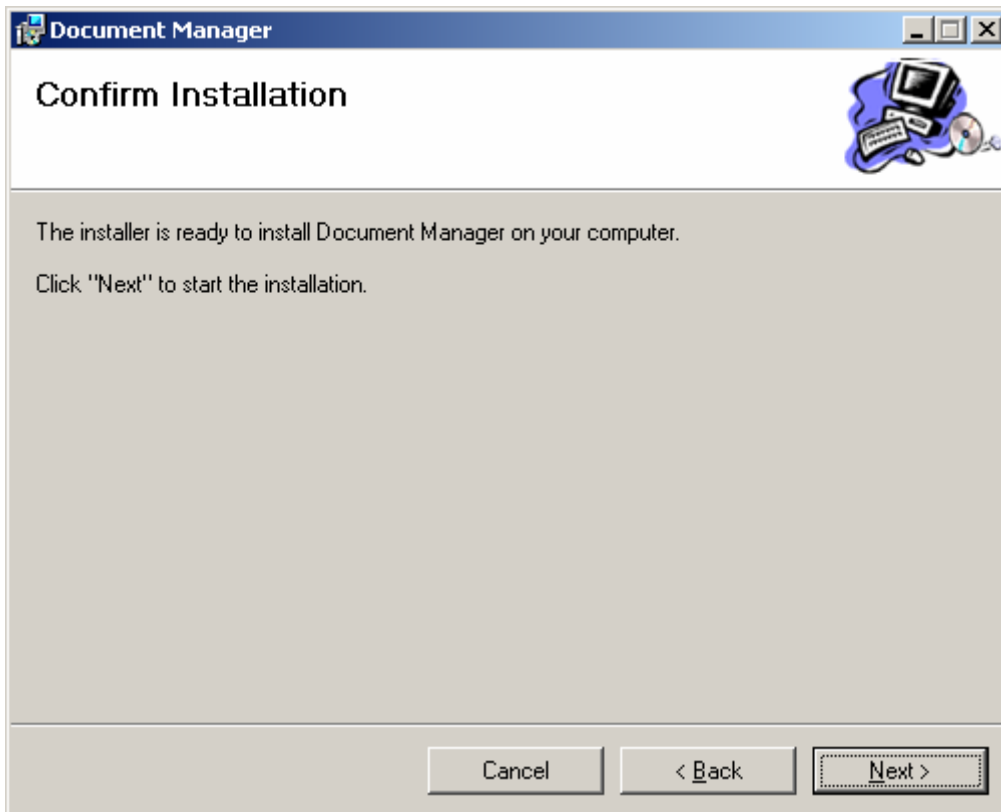
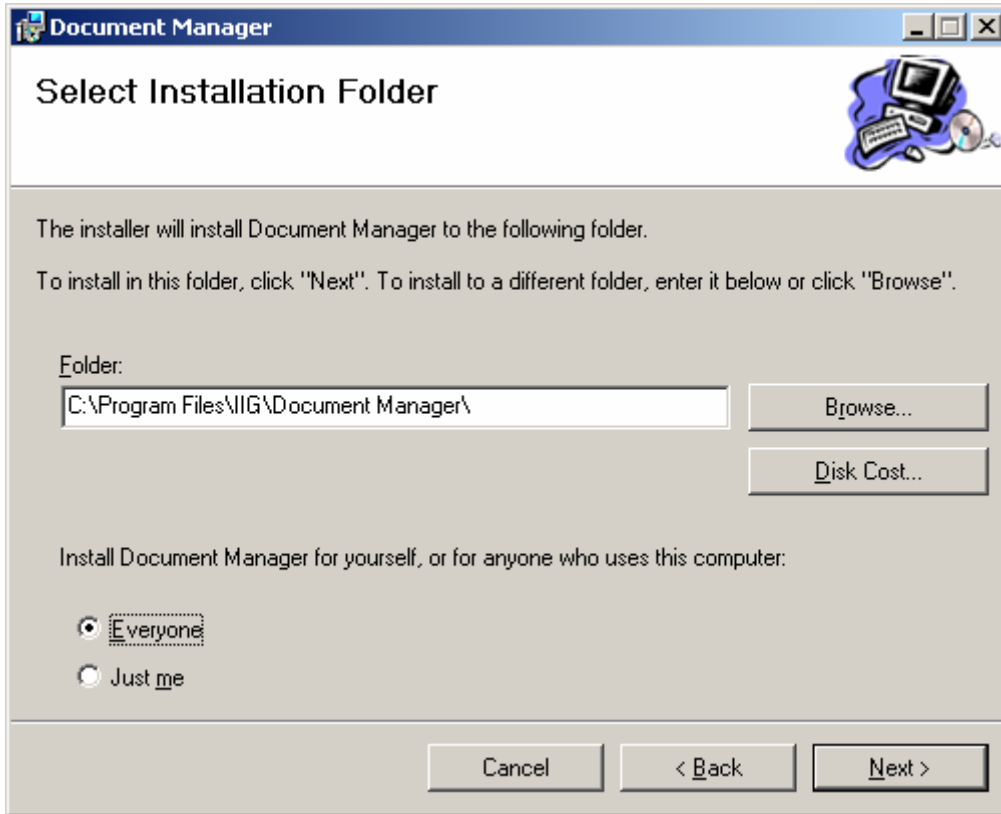
After installing an **IIG Enhancement**, permissions must be configured for newly created Tasks and Security Events.



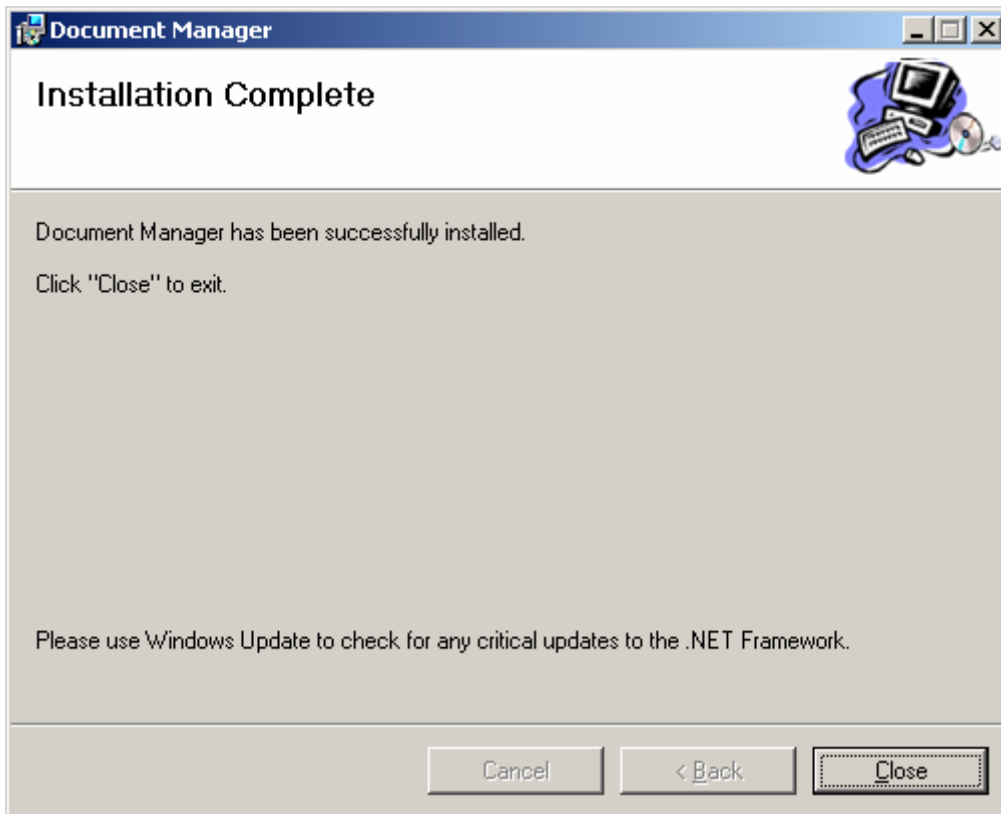
## Client Setup

The “Document Manager Setup.msi” file is present in the “DocumentManager\Client\” folder. After running it the following setup wizard will follow.

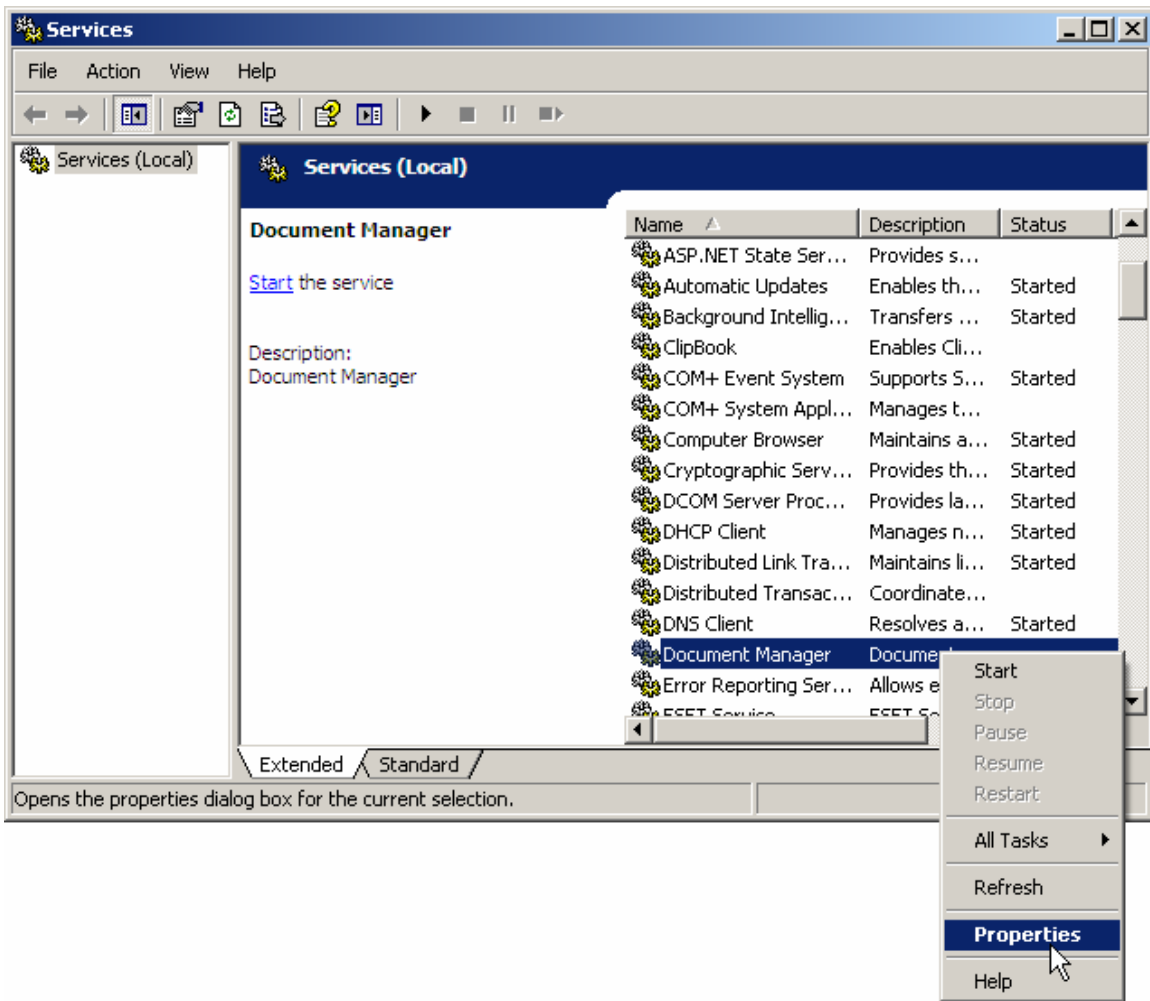




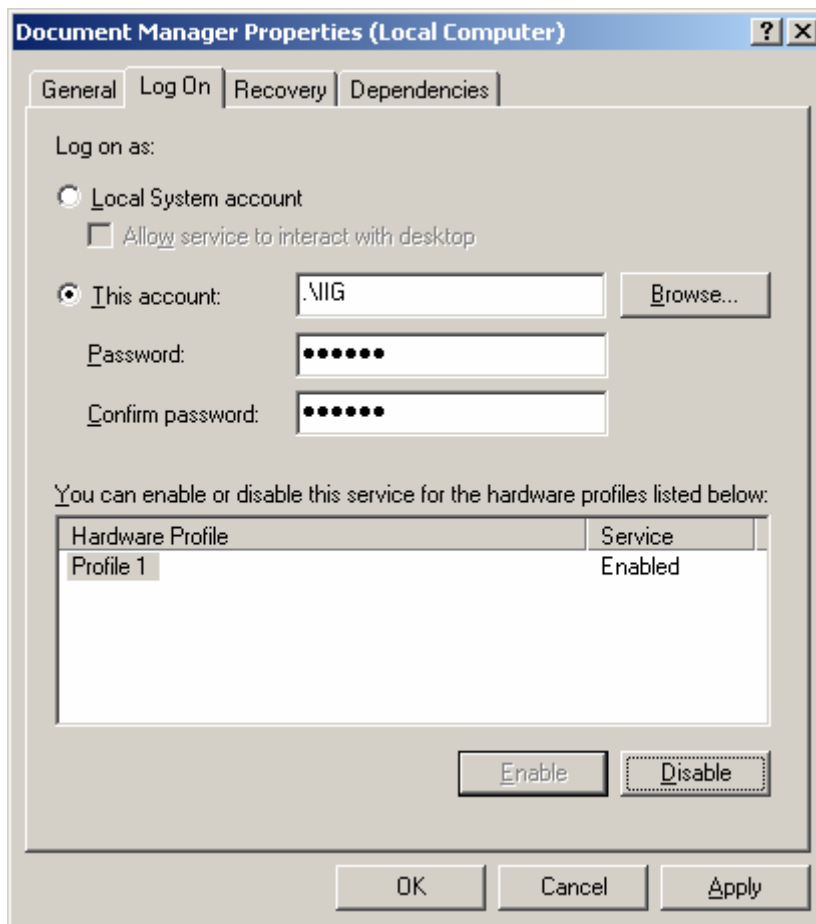




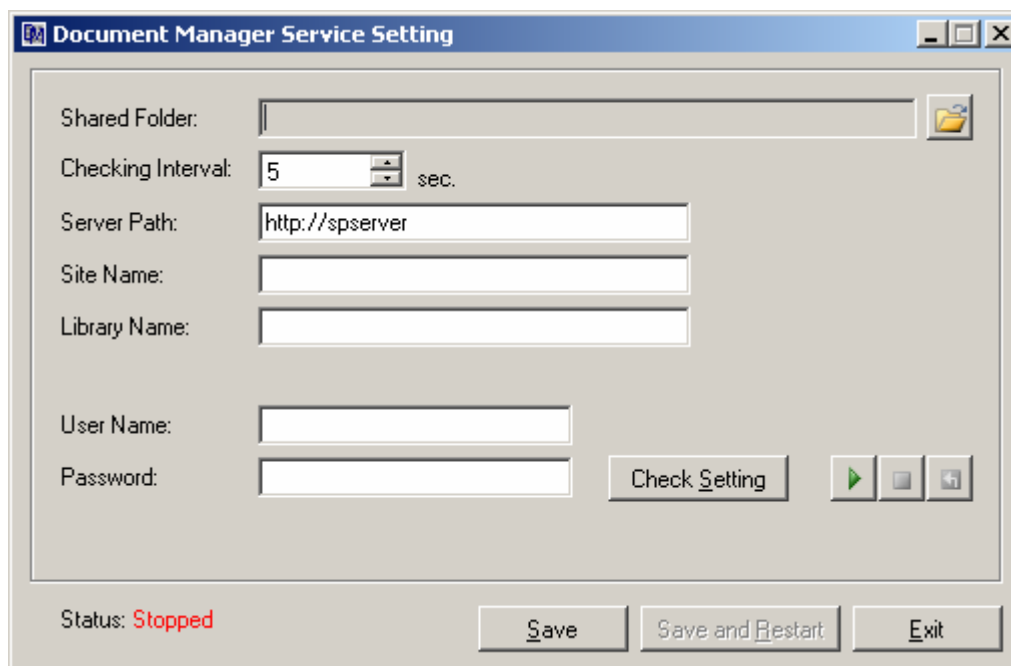
After the installation is completed open **Services** from **Administrative Tools**.



Go to the **Document Manager Properties** -> **Log On** tab, choose the **This account** option and select a user with administrative rights.



For starting the program run **Document Manager Setting** from **Start -> Programs -> IIG -> Document Manager Setting** menu.



**Shared Folder** – The Shared Folder (for MAS90 and Share Point Document Manager) must be specified here.

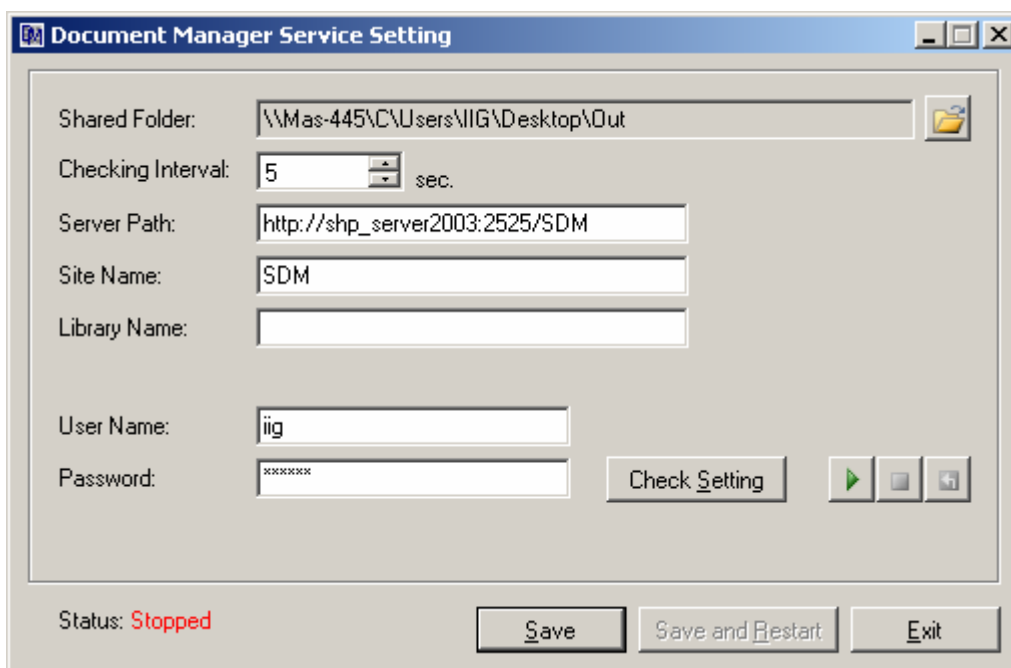
**Checking Interval** – Interval is set by seconds to check the Shared Folder.

**Server Path** – The server path is specified.

**Site Name** – The site name is specified.

**Library Name** – A default library name is specified.

**User Name, Password** – Such Username and Password must be specified which have rights for modifying access to the Share Point server.

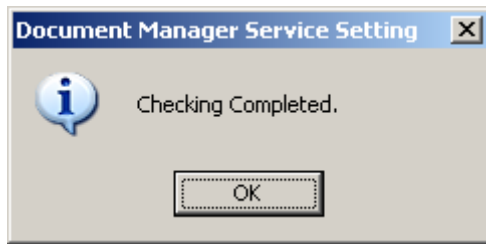


**Check Setting** – Press this button to verify the settings information on the screen.

If any setting does not match, an appropriate error message will be displayed. Here is an example:



If the whole specified data is correct, the following message will be displayed:



**Run, Stop, Restart Windows Service** – press the button to perform desired command.

**Save** – Press this button to save the settings. If the settings have been changed and saved, they can be applied only after the server is restarted. In order to not restart the server again, click the **Save and Restart** button.

## MAS90/200

### *Share Point Document Management Options*

The **Share Point Document Management Options** program has been added under the **Library Master Setup**. The needed settings must be done here by all means to enable the rest processing.

Temporary output folder must be specified in the **Choose Temporary Output Folder** field by all means. **Note that the path must be mentioned only through net when using MAS200. And in case of using MAS90, it's recommended to specify the path through net in order to avoid problems.**

In the **Share Point Library Name** fields specify the name of the library where documents must be uploaded into. The last three (A/R Checks, A/R Invoices, Customer PO) Library Names are just informative as no Printings are specified for them.

**Share Point Document Management Options (ABC) 1/8/2013**

Choose Temporary Output Folder  
\\Mas-445\C\Users\IIG\Desktop\Out

Upload to Share Point

		Share Point Library Name
Enable Pick Tickets <input checked="" type="checkbox"/>	Picking Sheet Printing <input checked="" type="checkbox"/>	Pick Tickets
URL Address	http://shp_server2003:2525/SDM/Pick%20Tickets/Forms/AllItems.aspx	
Enable A/P Checks <input checked="" type="checkbox"/>	A/P Check Printing <input checked="" type="checkbox"/>	AP Checks
URL Address	http://shp_server2003:2525/SDM/AP%20Checks/Forms/AllItems.aspx	
Enable Sales Invoices <input checked="" type="checkbox"/>	Sales Invoice Printing <input checked="" type="checkbox"/>	Sales Invoices
URL Address	http://shp_server2003:2525/SDM/Sales%20Invoices/Forms/AllItems.aspx	
Enable Customer Statements <input checked="" type="checkbox"/>	Customer Statement Printing <input checked="" type="checkbox"/>	Customer Statements
URL Address	http://shp_server2003:2525/SDM/Customer%20Statements/Forms/AllItems.aspx	
Enable Purchase Orders <input checked="" type="checkbox"/>	Purchase Order Printing <input checked="" type="checkbox"/>	Purchase Orders
URL Address	http://shp_server2003:2525/SDM/Purchase%20Orders/Forms/AllItems.aspx	
Enable A/R Checks <input checked="" type="checkbox"/>	A/R Checks <input checked="" type="checkbox"/>	A/R Checks
URL Address	http://shp_server2003:2525/SDM/AR%20Checks/Forms/AllItems.aspx	
Enable A/P Invoices <input checked="" type="checkbox"/>	A/P Invoices <input checked="" type="checkbox"/>	A/P Invoices
URL Address	http://shp_server2003:2525/SDM/AP%20Invoices/Forms/AllItems.aspx	
Enable Customer PO <input checked="" type="checkbox"/>	Customer PO <input checked="" type="checkbox"/>	Customer PO
URL Address	http://shp_server2003:2525/SDM/Customer%20PO/Forms/AllItems.aspx	

Accept Cancel

The path of the Share Point Library is specified in the **URL Address** field for each option by all means.

The check boxes (**Pick Sheet Printing, A/P Check Printing, Sales Invoice Printing, Customer Statement Printing** and **Purchase Order Printing**) will be defaulted in the corresponding screens for the **Upload to Share Point** options.

Check boxes (**Enable Pick Tickets, Enable A/P Checks, Enable Sales Invoices, Enable Customer Statements, Enable Purchase Orders, Enable A/R Checks, Enable A/P Invoices** and **Enable Customer PO**) have been added to enable/disable the whole functionality in documents related to appropriate libraries.

*Note: These options must be specified for each Company separately.*

## Sales Order

### Picking Sheet Printing

The **Upload to Share Point** check box and **Share Point Documents** button have been added to the **Main** tab of **Picking Sheet Printing** screen.

Picking Sheet Printing (ABC) 12/12/2012

Form Code: STANDARD  
Description: Plain

Number of Copies: 1 Collated:  Multi-Part Form Enabled:  Multi Part...

Order Type to Print: All  
Print Orders on Hold:   
Print Comments: Partial

Include Unauthorized/Expired Credit Card Orders:   
Include Back Order Quantity in Quantity Ordered:   
Include Back Ordered Lines:

Additional Item Types to Print  
Charge Items:  Miscellaneous Items:  Special Items:

Line 1 Message:   
Line 2 Message:

Share Point  
Upload to Share Point:  Share Point Documents:

Selections: Share Point Documents, Alt-W

Select Field	Operand	Value
Order Number	All	
Warehouse Code	All	

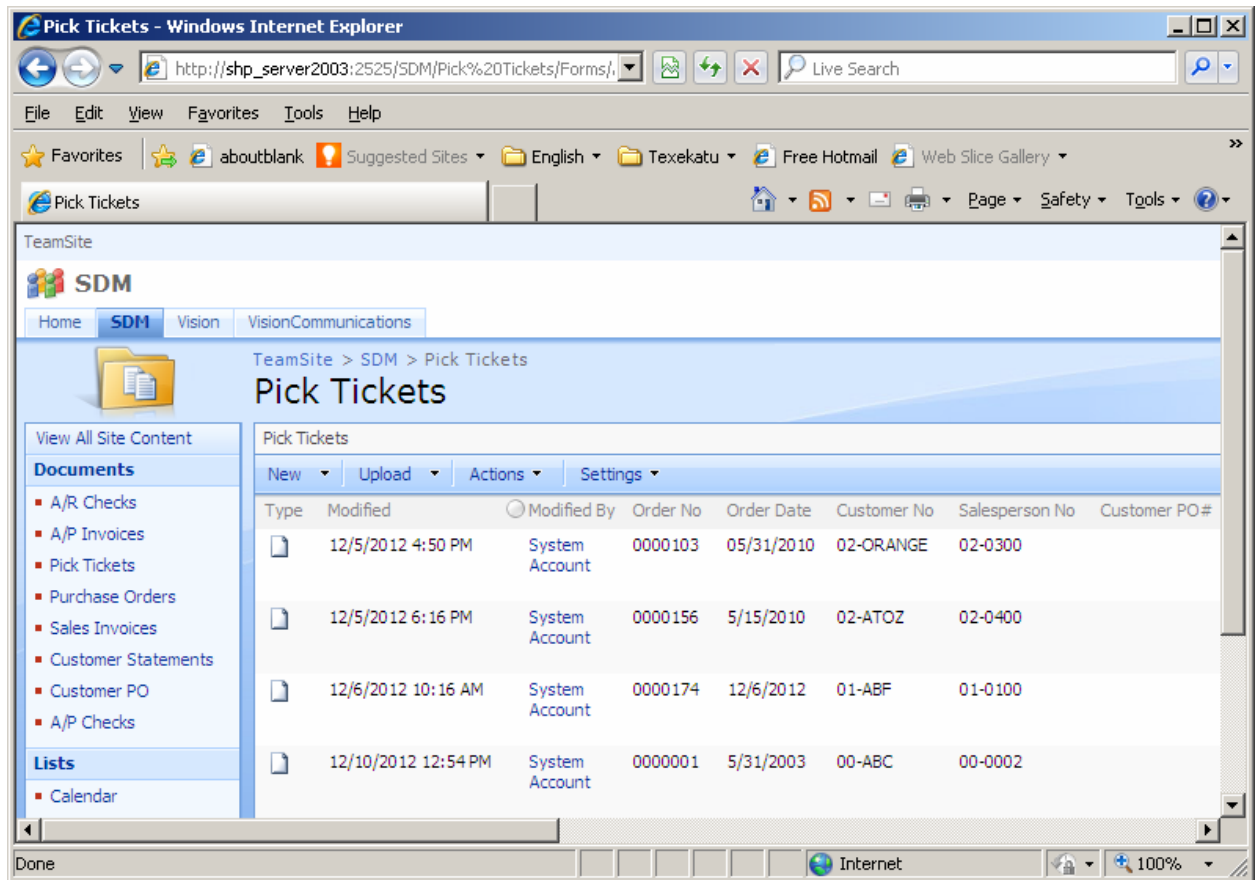
Adobe PDF Alignment Print Preview Setup ?

If the **Upload to Share Point** check box is selected and there is a printer selected then while **Printing**, the report will be printed after which separate PDF files will be created for each selected Order and sent to upload to Share Point (after printing the Order). Note that the upload will not be done during previewing mode.

The **Share Point** group fields will be available if **Enable Pick Tickets** check box is selected in the **Share Point Document Management Options**.




Press the **Share Point Documents** button to go to the **Pick Tickets** Library of Share Point server.



## S/O Invoice Printing

The **Upload to Share Point** check box and **Share Point Documents** button have been added to the **Main** tab of **S/O Invoice Printing**.

Form Code: STANDARD  
Description: Preprinted Laser  
Number of Copies: 1  
Collated:   
Multi-Part Form Enabled:   
Sort Invoices By: Invoice Number  
Invoice Type to Print: All  
Print Comments: Partial  
Print Invoices Already Printed:   
Line 1 Message:   
Line 2 Message:   
Share Point  
Upload to Share Point:  Share Point Documents:   
Selections  

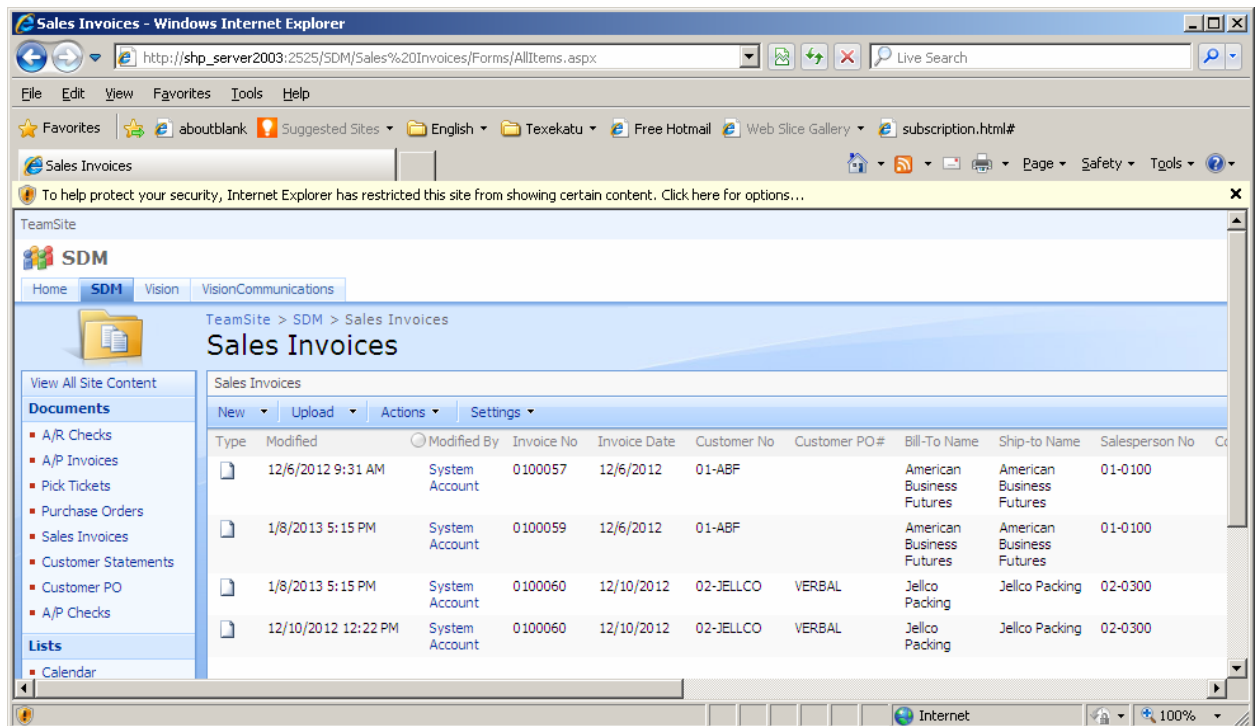
Select Field	Operand	Value
Invoice Number	All	
Warehouse Code	All	

  
Microsoft Office Document Image Writer  
Alignment  
Print  
Preview  
Setup

If the **Upload to Share Point** check box is selected and printer is selected then while **Printing**, the report will be printed after which separate PDF files will be created for each selected Invoice and sent to upload to Share Point (after printing the Invoice). Note that the upload will not be done in the Preview mode.

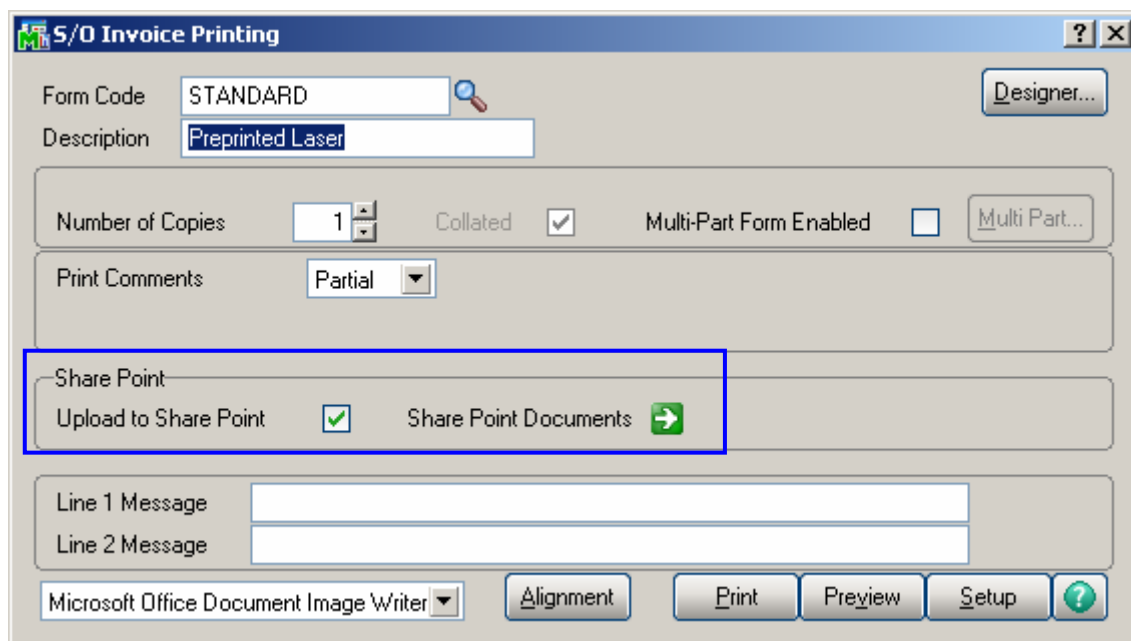
The **Share Point** group fields will be available if **Enable Sales Invoices** check box is selected in the **Share Point Document Management Options**.

Press the **Share Point Documents** button to go to the **Sales Invoices** Library of Share Point server.




## S/O Invoice Data Entry Quick Printing

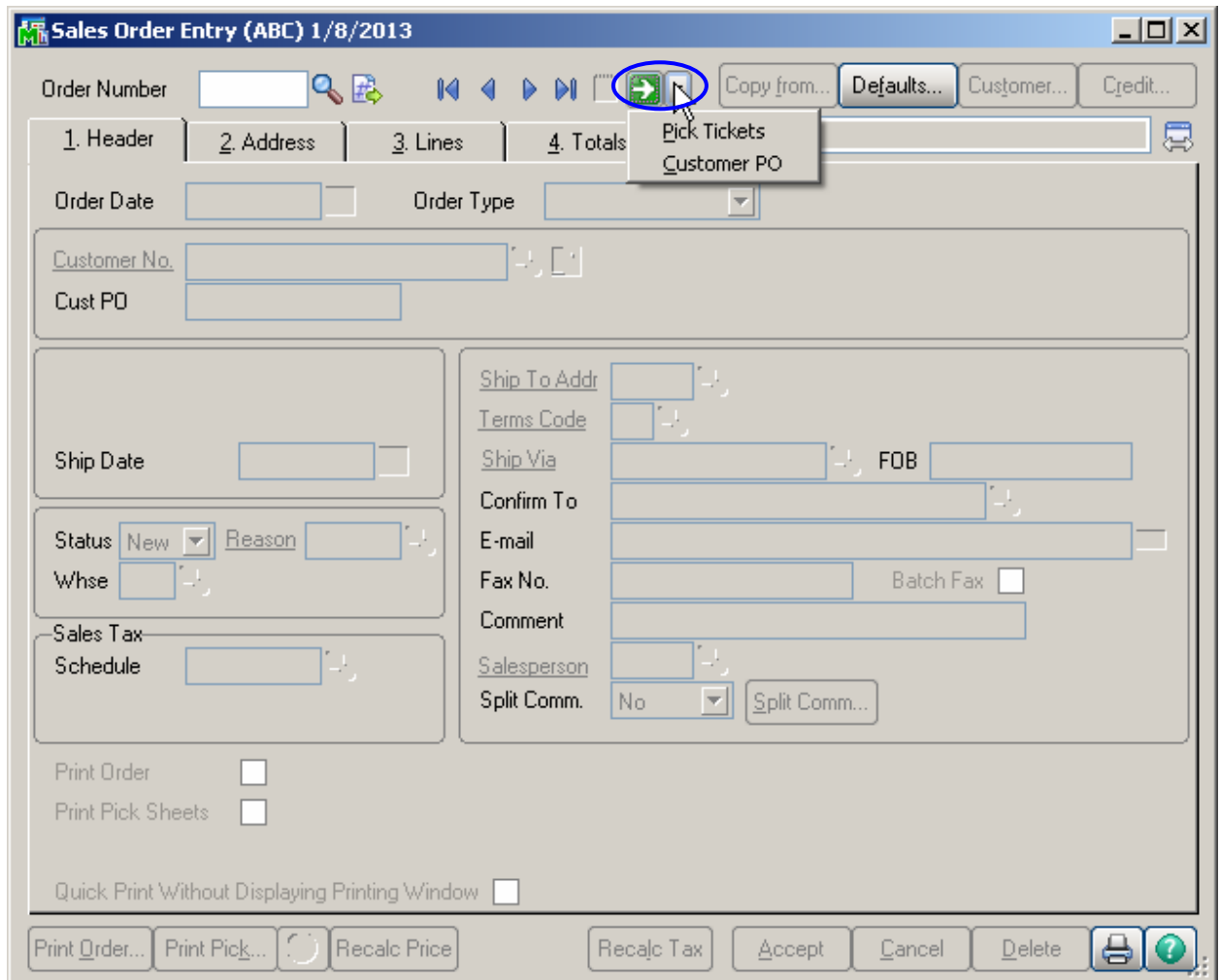
The **Upload to Share Point** check box and **Share Point Documents** button have been added to the **S/O Invoice Printing** screen which is opened by clicking on the **Quick Print** button from **S/O Invoice Data Entry** screen.



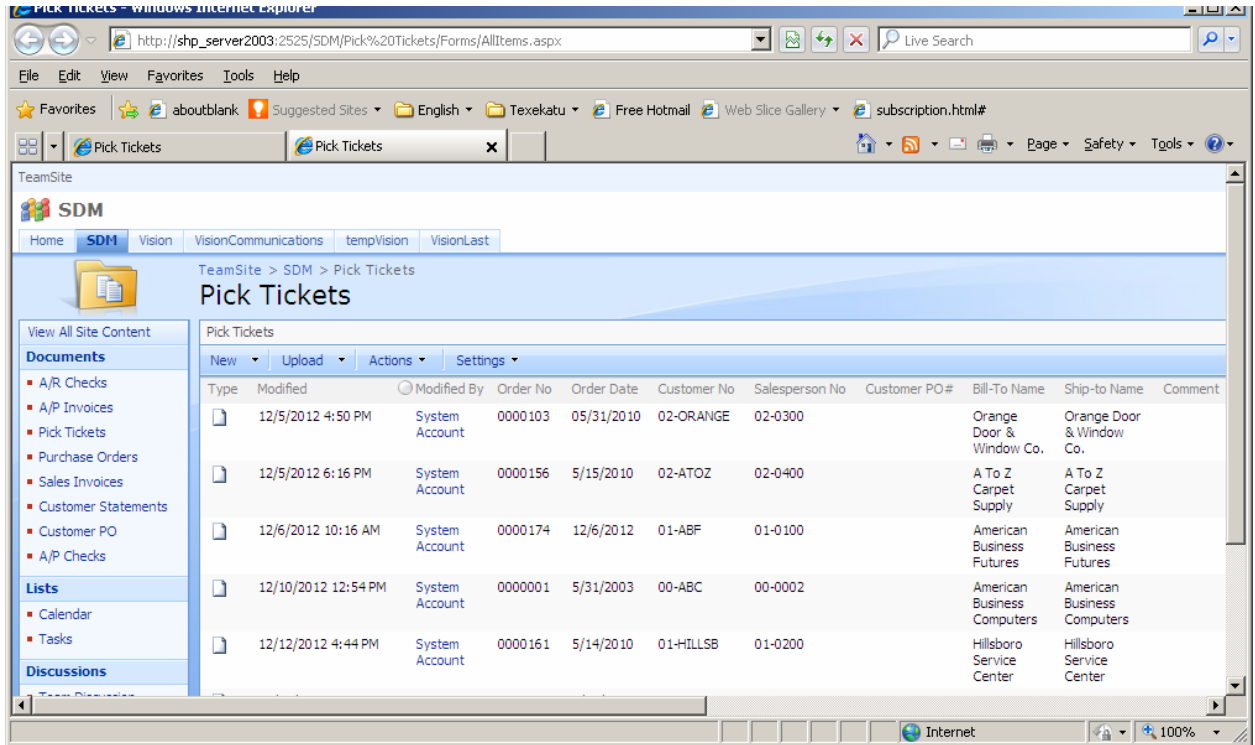
If the **Upload to Share Point** check box is on and printer is selected then while **Printing**, the report will be printed after which a separate PDF file will be created for current Invoice and sent to upload to Share Point (after printing the Invoice). Note that the upload will not be done in the Preview mode.

## Sales Order Entry


The  drop-down button has been added to the **Sales Order Entry** header, which leads to Share Point to view the documents of the following Libraries: **Pick Tickets** and **Customer PO**. The user can select the desired library from the list or just click on the button without opening the list. The first library listed in the drop-down menu will be selected by default.



If no Order is selected, all the documents will be listed in Share Point, otherwise, if an Order is selected then only the ones will be listed which are related with that Order.



**Sales Order Inquiry, Sales Order Quote/History Inquiry**

Similar button  as in **Sales Order Entry** has been added also in **Sales Order Inquiry** and **Sales Order/Quote History Inquiry**.

**Sales Order Inquiry (ABC) 1/8/2013**

Order Number: 0000174

Order Date: 12/6/2012

Order Type: Standard Order

Customer No.: 01-ABF

Ship Date: 12/6/2012

Status: New

Whse: 001

Ship To Addr: 2

Terms Code: 01

Ship Via: UPS BLUE

Confirm To: John Quinn

E-mail: artie@abf.com

Salesperson: 0100

Split Comm.: No

Print Order

Print Pick Sheets

Quick Print Without Displaying Printing Window

Buttons: Print Order..., Print Pick..., Recalc Price, OK, ?

## Accounts Payable

### A/P Check Printing

The **Upload to Share Point** check box and **Share Point Documents** button have been added to the **Check Printing** screen.

Bank Code: D Wells Fargo Checking

Form Code: STANDARD

Description: Preprinted Laser

Multi-Part Form Enabled:  Multi Part...

Sort Checks By: Vendor Number

Check Date: 1/8/2013

Starting Check Number: 000076

Check Form Type: Stub, Check

Print Remit To Information:

Print Checks Already Printed:

Print G/L Distribution:

Print in ANSI Format:

Check Message:

Stub Message:

Stub Lines: 19

Share Point

Upload to Share Point:  Share Point Documents:

Select Field	Operand	Value
Vendor Number	All	
Check Entry Number	All	
Vendor Name	All	

Microsoft Office Document Image Writer

Alignment

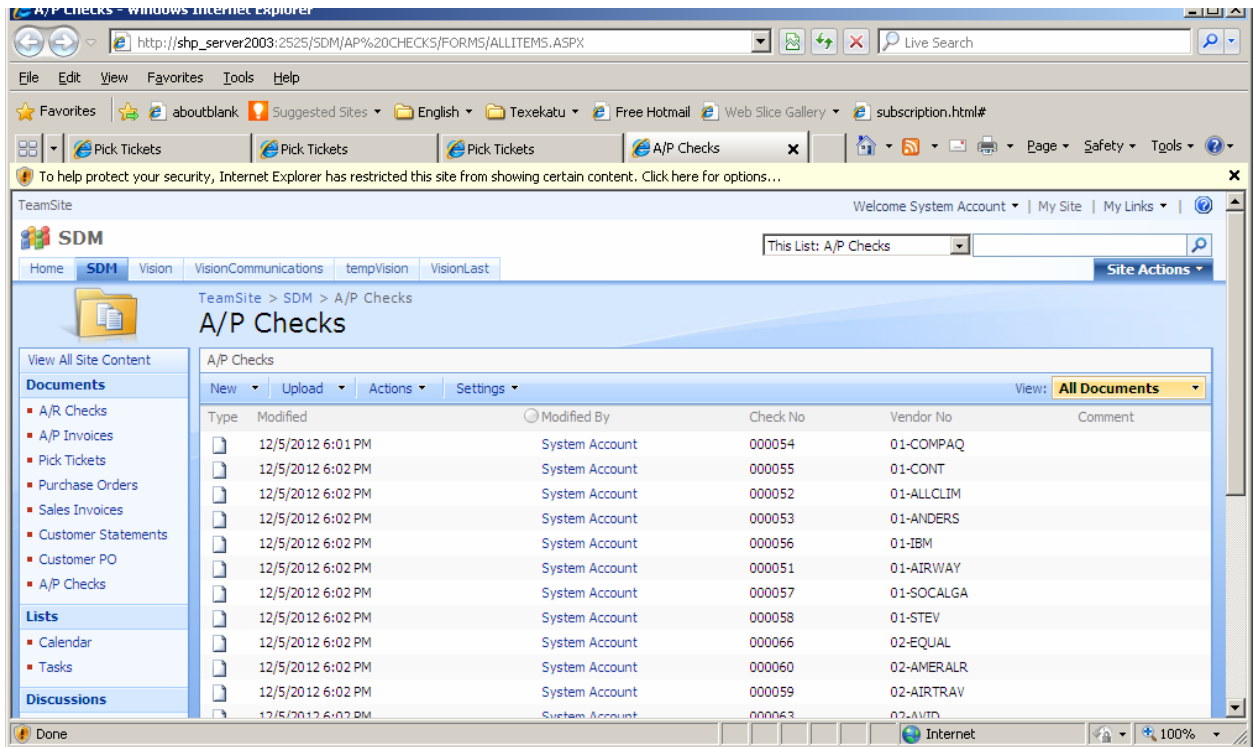
Print Preview Setup

If the **Upload to Share Point** check box is on and printer is selected then while **Printing**, the report will be printed after which separate PDF files will be created for each selected Check and sent to upload to Share Point (after printing the Check). Note that the upload will not be done in the Preview mode.

The **Share Point** group fields are available if **Enable A/P Checks** check box is selected in the **Share Point Document Management Options**.

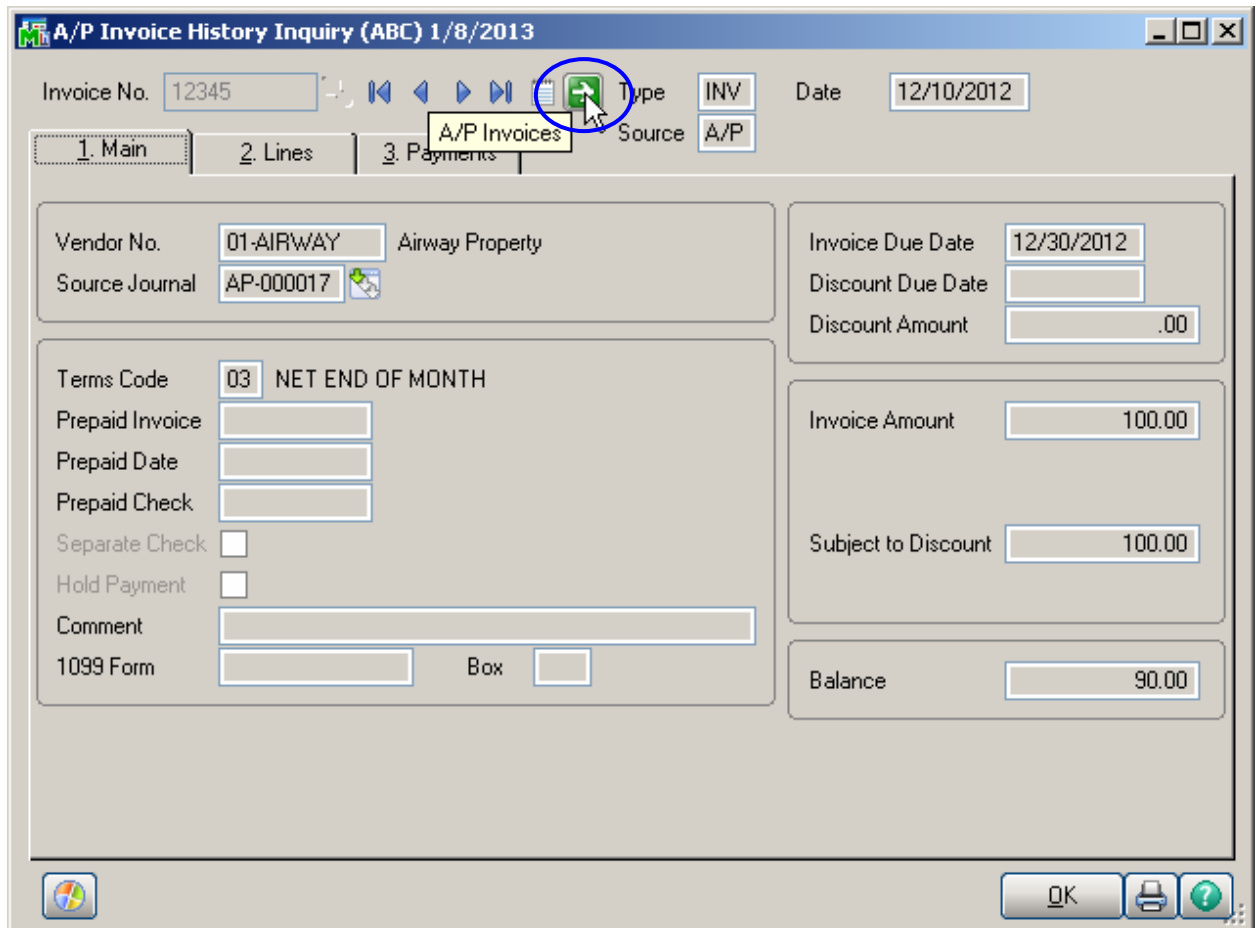


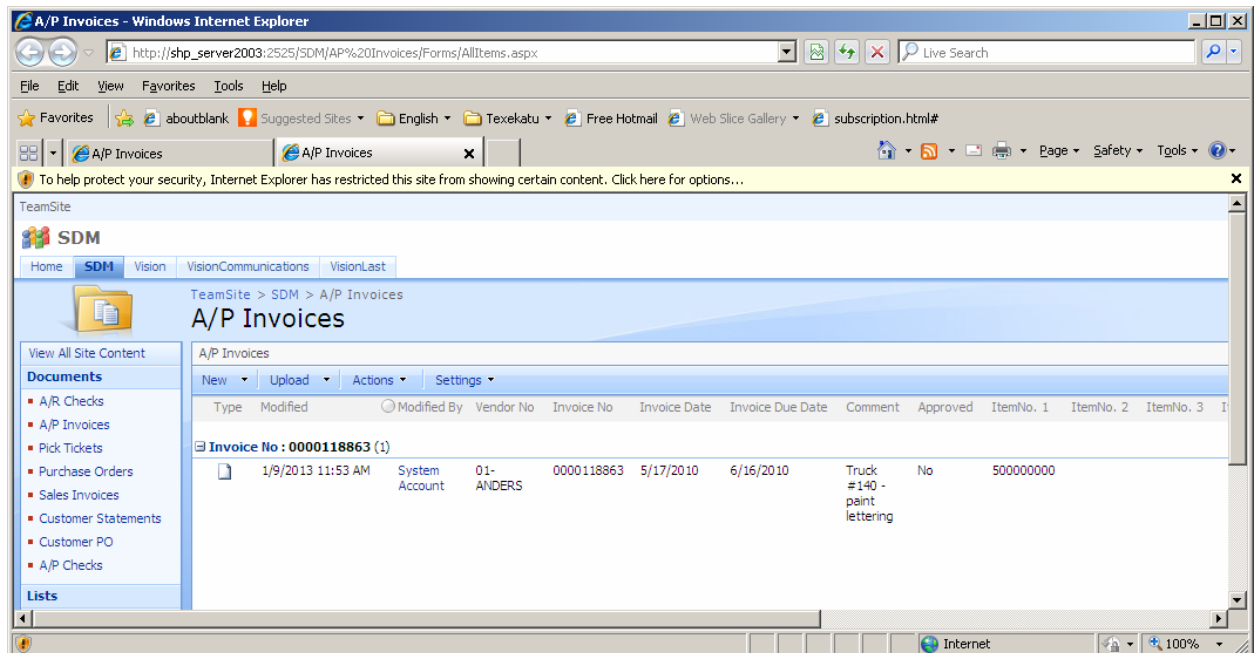
Press the **Share Point Documents** button to go to the **A/P Checks** Library of the Share Point server.



### A/P Invoice History Inquiry

The **A/P Invoices** button has been added to the **A/P Invoice History Inquiry** header which leads to Share Point where the **A/P Invoices** Library documents are displayed according to the selected Invoice No. and Vendor No.

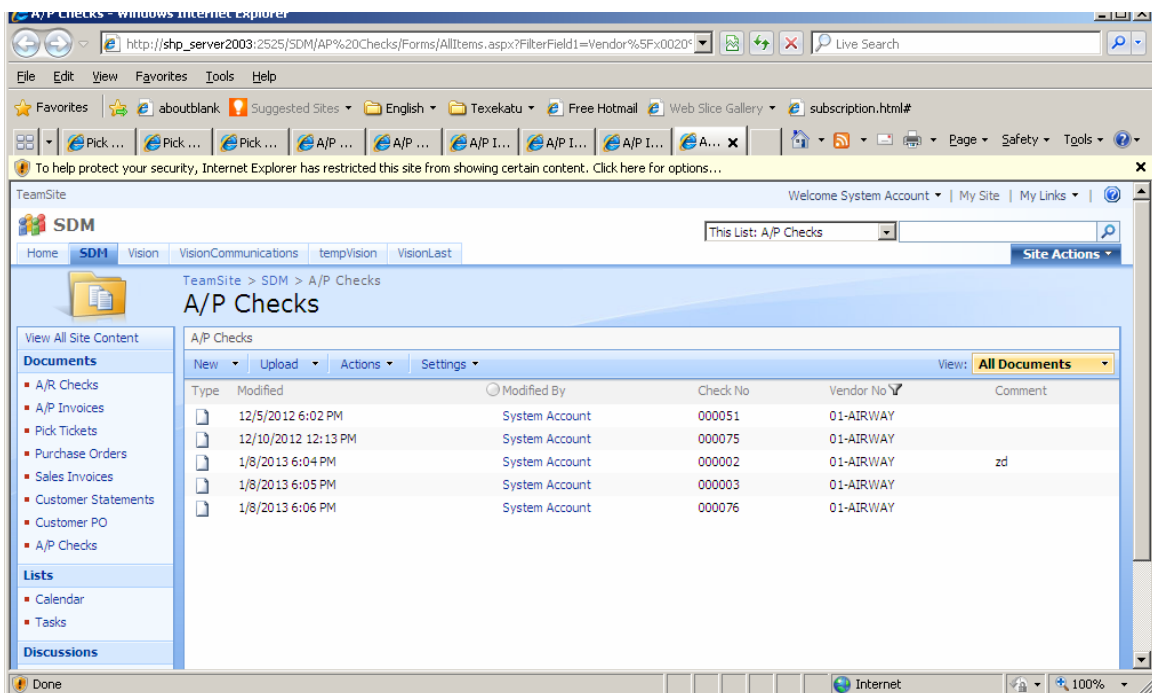
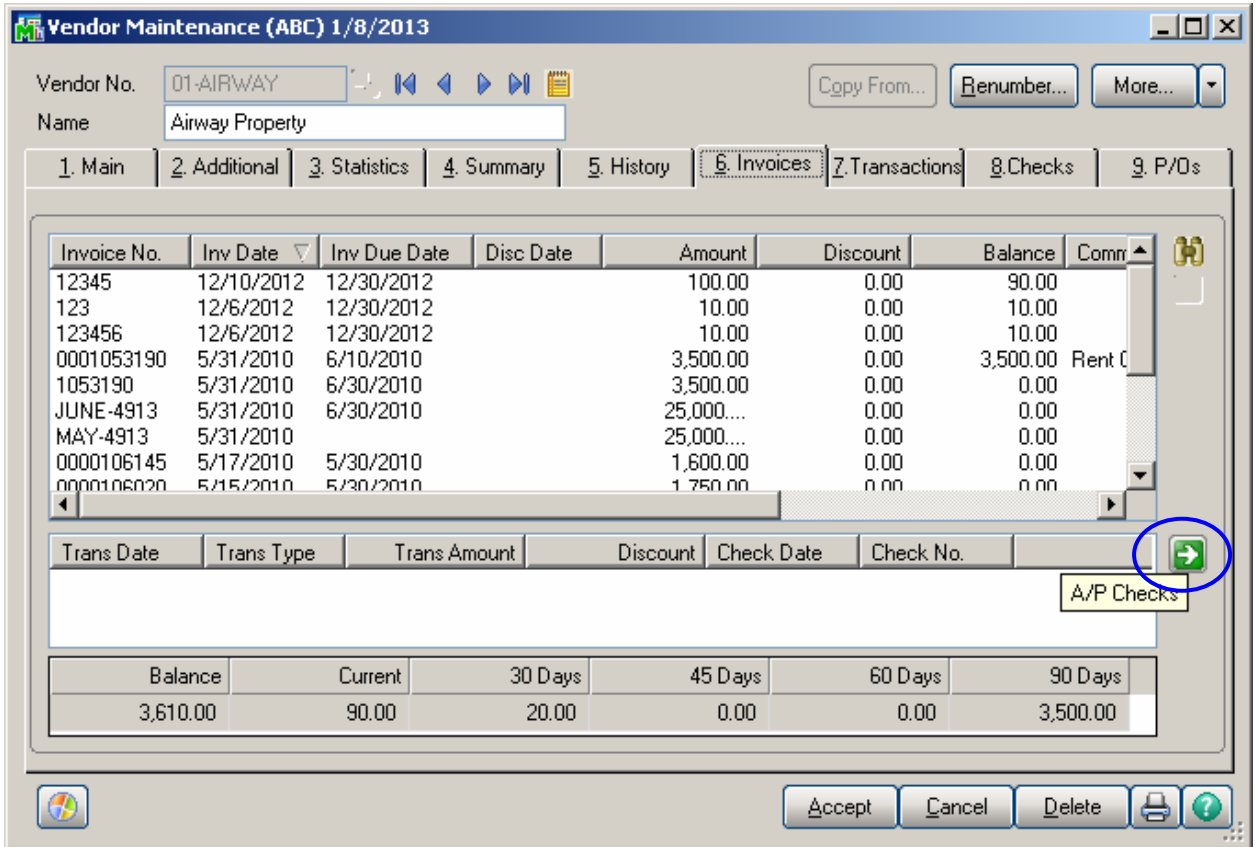




If no Invoice No. is selected, then all the documents of the appropriate Library will be listed in Share Point.

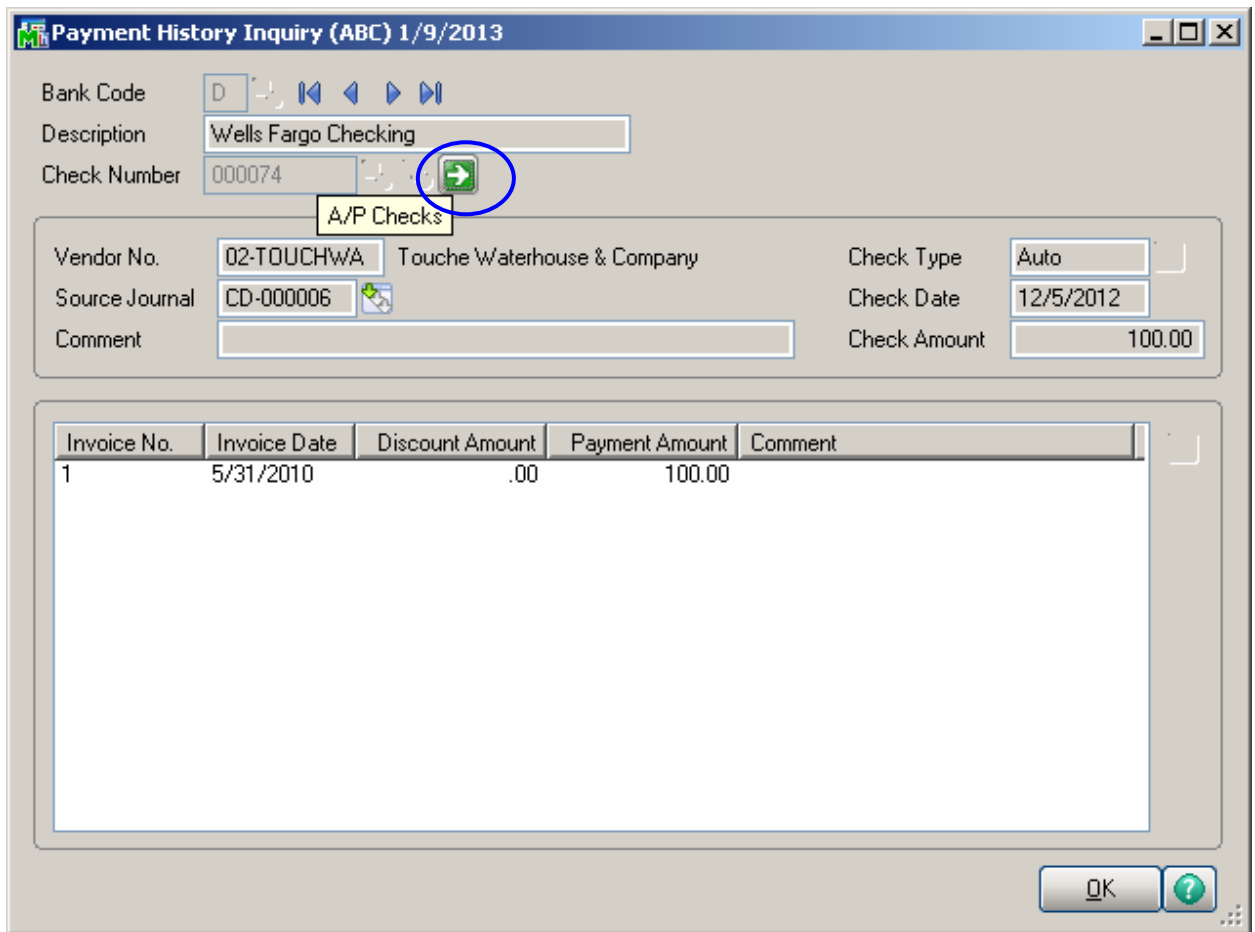
## Vendor Maintenance, Vendor Inquiry

The **A/P Checks** button has been added to the **Invoices** tab of **Vendor Maintenance** and **Vendor Inquiry** which leads to Share Point where Library documents are displayed according to the selected Vendor No.

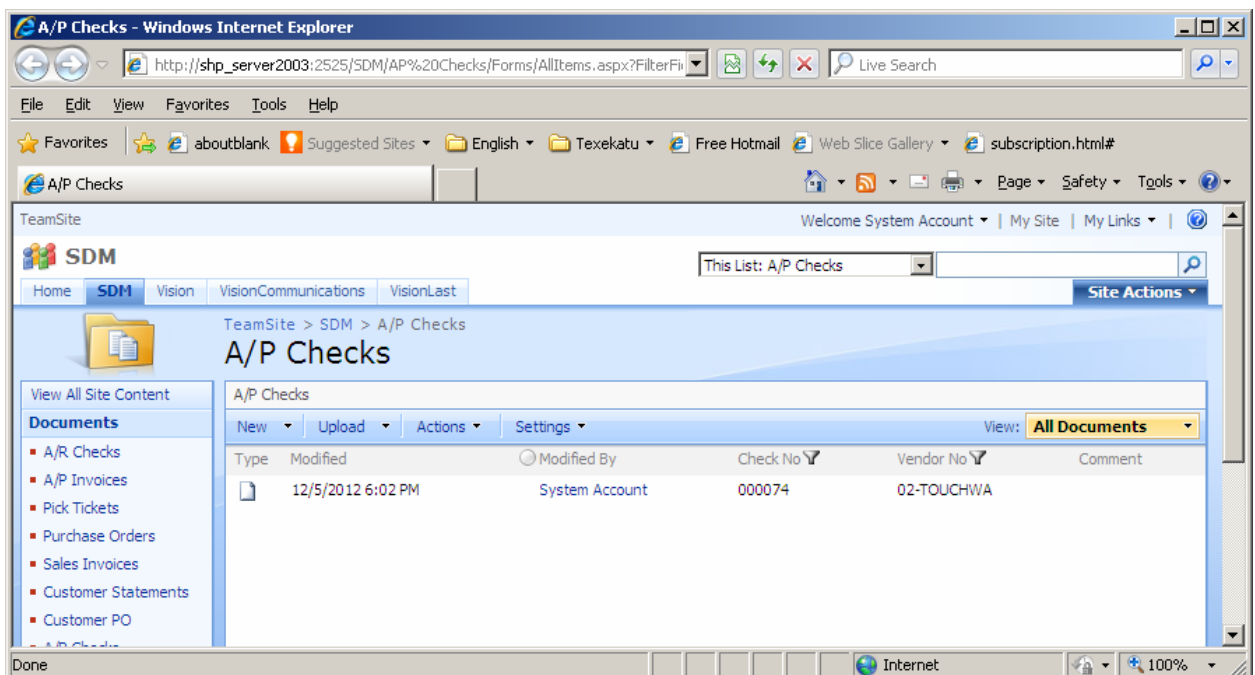


### Payment History Inquiry

The **A/P Checks** button has been added to the **Payment History Inquiry** screen which leads to Share Point where Library documents are displayed according to the selected Check Number and Vendor No.



If no Check Number is selected, then all the documents of the appropriate Library will be listed in Share Point.



## Purchase Order

### Purchase Order Printing

The **Upload to Share Point** check box and **Share Point Documents** button have been added to the **Purchase Order Printing** screen.

Purchase Order Printing (ABC) 1/9/2013

Form Code: STANDARD

Description: Preprinted Laser

Number of Copies: 1   Collated:  Multi-Part Form Enabled:

Sort Orders By: Purchase Order Number

Order Type to Print: All  Print Comments: Partial

Order Status to Print: All  Print Extended Item Description:

Line 1 Message:

Line 2 Message:

Share Point

Upload to Share Point:  Share Point Documents:

Selections

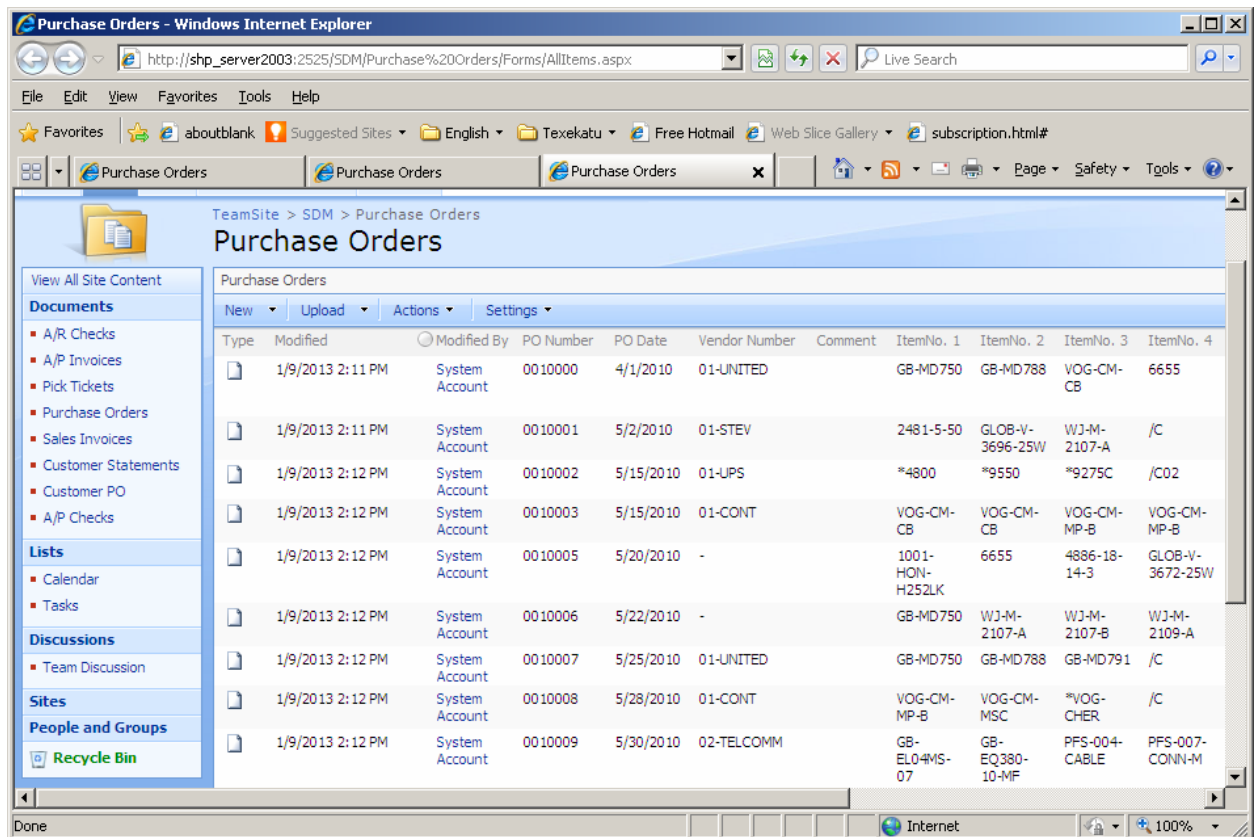
Select Field	Operand	Value
Purchase Order Number	All <input type="button" value="▼"/>	
Vendor Number	All <input type="button" value="▼"/>	

Microsoft Office Document Image Writer

If the **Upload to Share Point** check box is on and printer is selected then while **Printing**, the report will be printed after which separate PDF files will be created for each selected Order and sent to upload to Share Point (after printing the Order). Note that the upload will not be done in the Preview mode.

The **Share Point** group fields are available if **Enable Purchase Orders** check box is selected in the **Share Point Document Management Options**.

Press the **Share Point Documents** button to go to the **Purchase Orders** Library of Share Point server.



## Purchase Order Entry Quick Printing

The **Upload to Share Point** check box and **Share Point Documents** button have been added to the **Crystal Purchase Order Printing** screen opened by clicking on the **Quick Print** button from **Purchase Order Entry** screen.

The screenshot shows a 'Purchase Order Printing' dialog box with the following fields and controls:

- Form Code: STANDARD
- Description: Preprinted Laser
- Number of Copies: 1
- Collated:
- Multi-Part Form Enabled:
- Print Comments: Partial
- Print Extended Item Description:
- Line 1 Message: (empty)
- Line 2 Message: (empty)
- Share Point section (highlighted with a blue box):
  - Upload to Share Point:
  - Share Point Documents:
- Printer: Microsoft Office Document Image Writer
- Buttons: Alignment, Print, Preview, Setup, Help

If the **Upload to Share Point** check box is on and printer is selected then while **Printing**, the report will be printed after which a separate PDF file will be created for current Order and sent to upload to Share Point (after printing the Order). Note that the upload will not be done in Preview mode.



**Purchase Order Entry, Purchase Order Inquiry**

The **Purchase Orders** button has been added to the **Purchase Order Entry** and **Purchase Order Inquiry** screens which leads to Share Point where Library documents are displayed according to the selected Order Number.

Type	Modified	Modified By	PO Number	PO Date	Vendor Number	Comment	ItemNo. 1	ItemNo. 2	ItemNo. 3	ItemNo. 4	ItemNo. 5	ItemNo. 6
	1/9/2013 2:31 PM	System Account	0010014	5/31/2010	01-STEVE	NOTIFY GFJ UPON RECEIPT	1001-HON-H252	2480-8-50	/CABLES	/CO1		

If no Order Number is selected, then all the documents of the appropriate Library will be listed in Share Point.

## Account Receivable

### Statement Printing

The **Upload to Share Point** check box and **Share Point Documents** button have been added to the **Statement Printing** screen.

Statement Printing (ABC) 1/9/2013

Form Code: STANDARD

Description: Preprinted Laser

Number of Copies: 1

Collated:

Multi-Part Form Enabled:

Sort Statements By: Customer Number

Age Invoices as Of: 1/9/2013

Select Statements with Minimum Balance Of: .00

Select Customers with Balance Past Aging Category: Current Category

Include:

Temporary Customers: Yes

Zero Balance Customers:

Credit Balances: No

Zero Balance Invoices: Current Month Only

Share Point:

Upload to Share Point:  Share Point Documents:

Select Field	Operand	Value
Statement Cycle	All	
Customer Number	All	
Customer Name	All	
Salesperson	All	

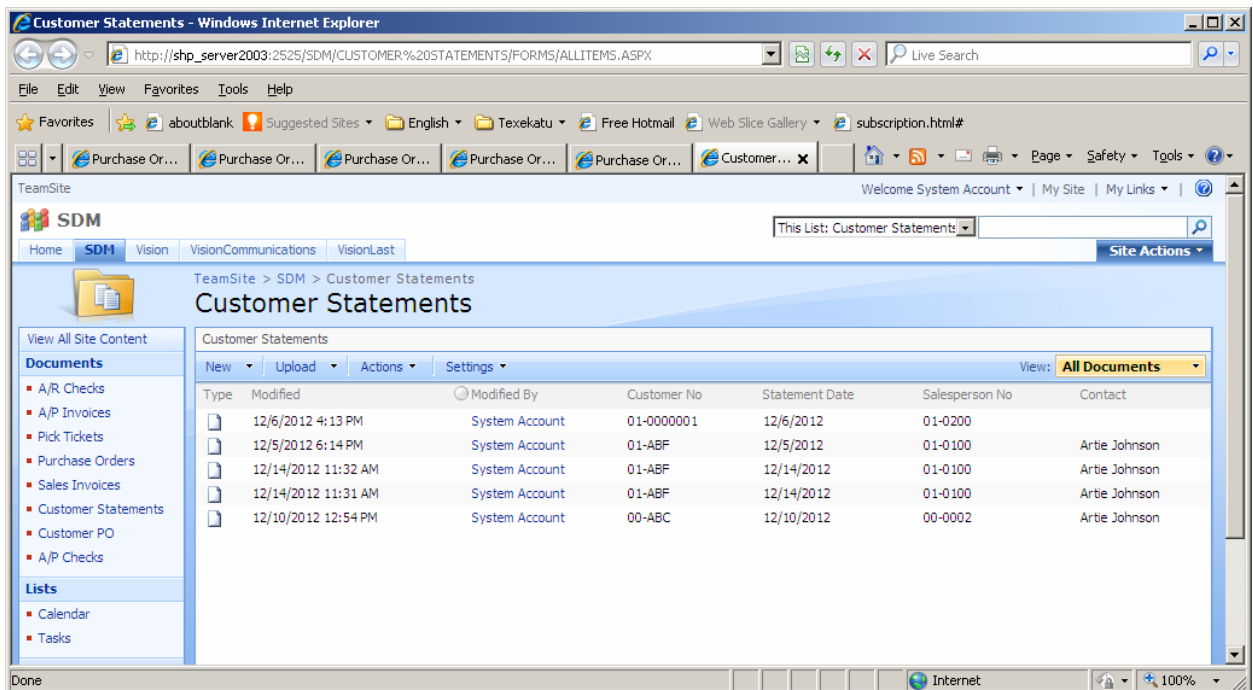
Microsoft Office Document Image Writer

Alignment Print Preview Setup

If the **Upload to Share Point** check box is on and printer is selected then while **Printing**, the report is printed after which separate PDF files are created for each selected Customer and sent to the respective folder to upload to Share Point. Note that the upload will not be done during previewing mode.

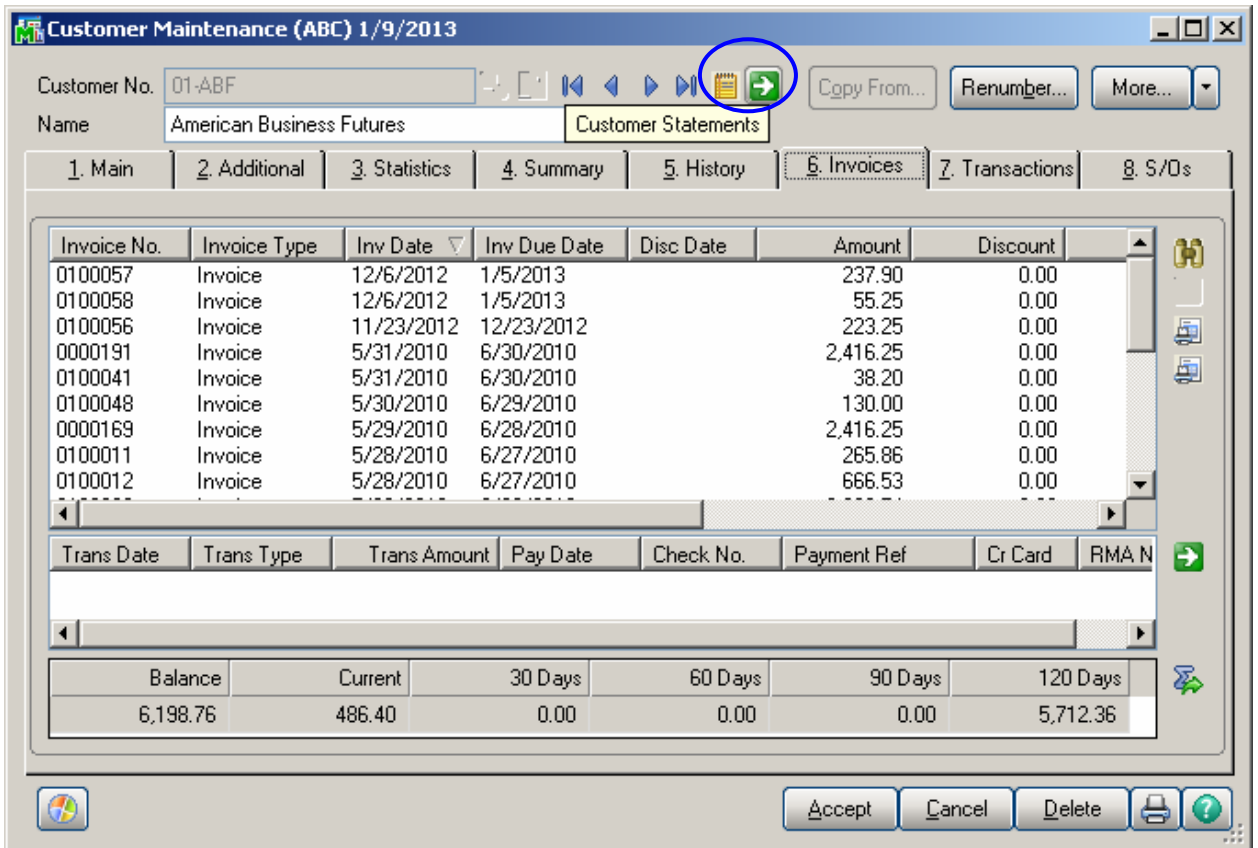
The **Share Point** group fields will be available if **Enable Customer Statements** check box is selected in the **Share Point Document Management Options**.

Press the **Share Point Documents** button to go to the **Customer Statements** Library of Share Point server.

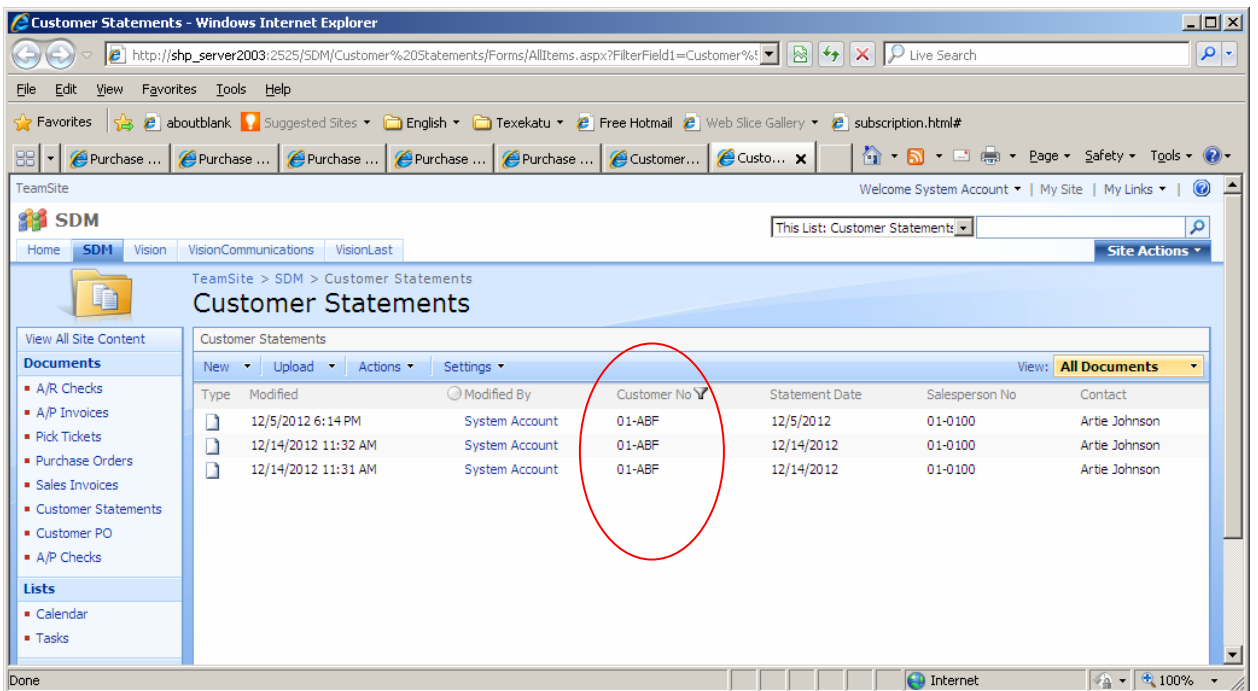


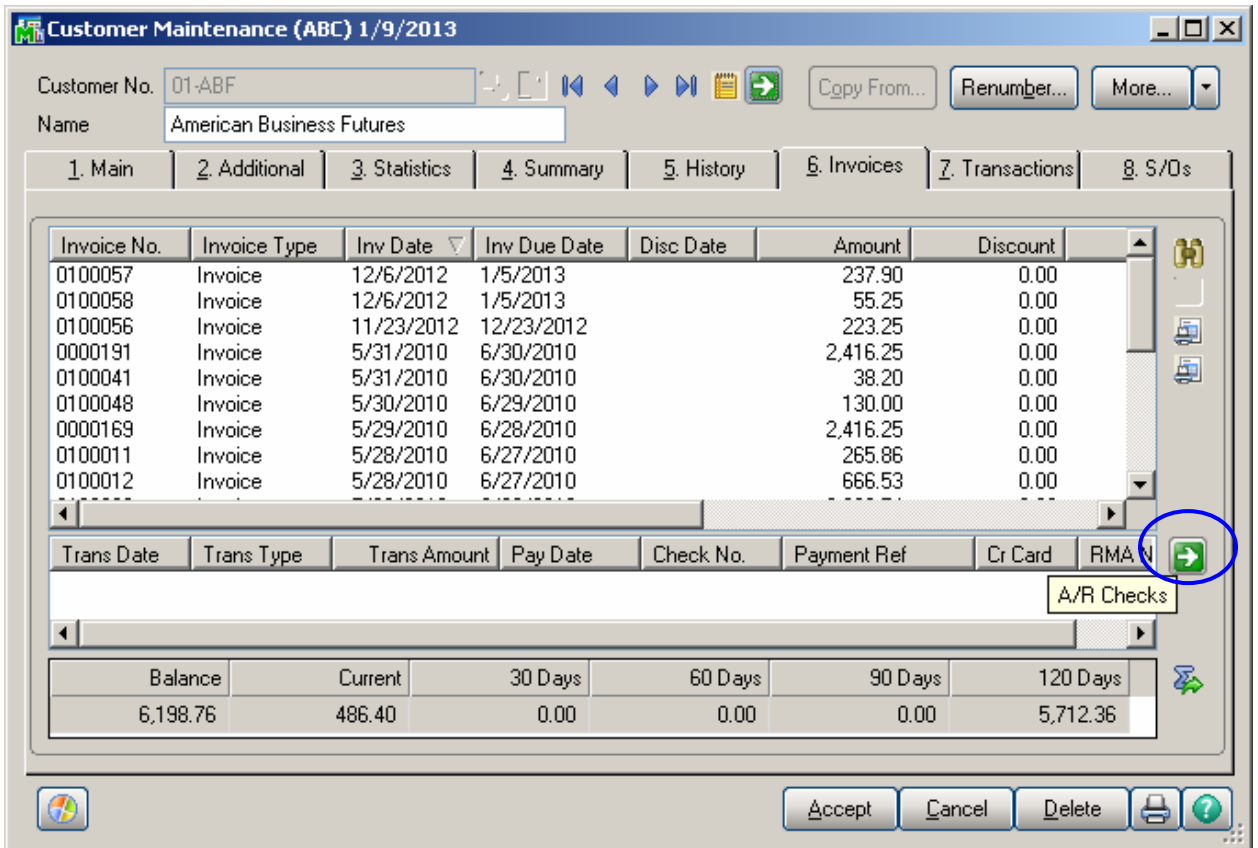
## Customer Maintenance, Customer Inquiry

The **Customer Statements** and **A/R Checks** buttons have been added to the **Customer Maintenance** and **Customer Inquiry** headers and **Invoices** tab correspondingly which lead to Share Point.

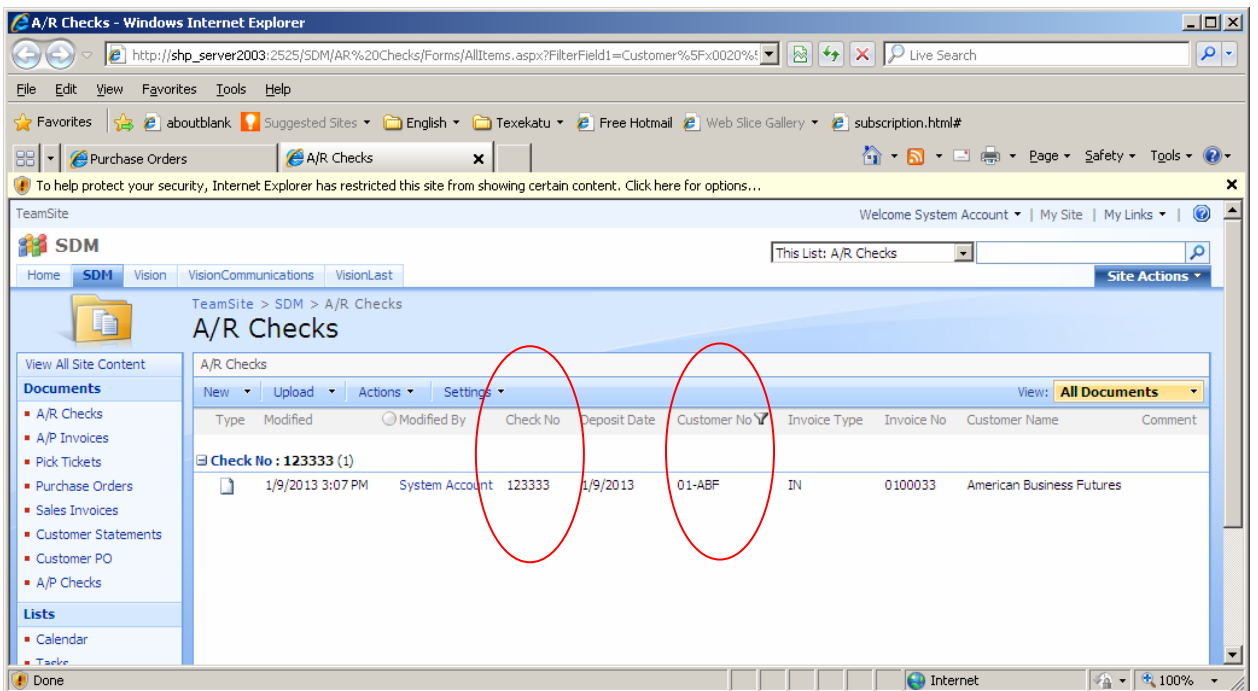


**Customer Statements** – When pressed, the documents of all the Customers will be listed in Share Point if no **Customer No** is selected. Otherwise, if a **Customer No** is selected, only the documents of current Customer will be listed.




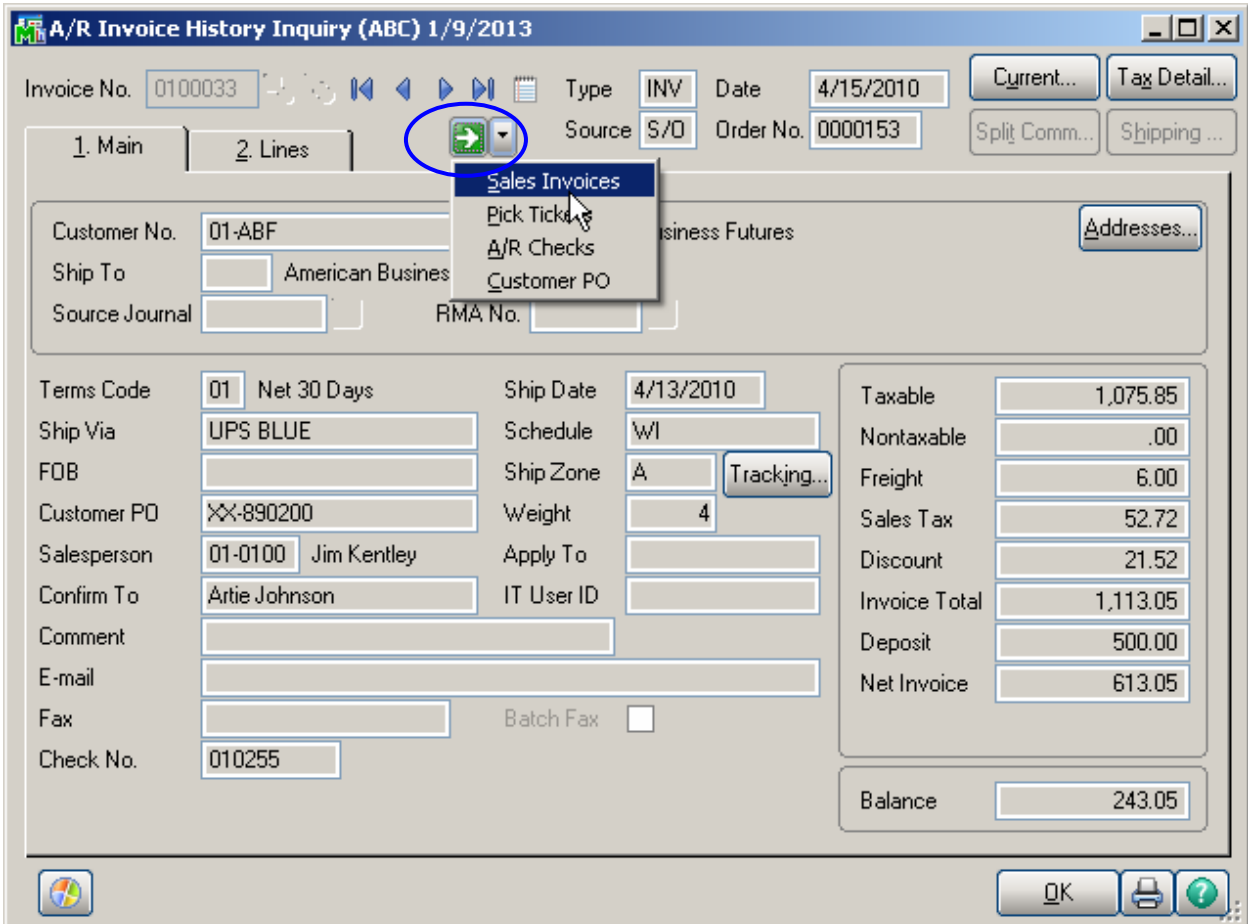


**A/R Checks** – When pressed, all the A/R Checks Library documents of current Customer will be listed in Share Point if no line is selected below. Otherwise, if a line with a **Check No** is selected, then only those documents will be listed which belong to current Customer No and Check No.



## Invoice History Inquiry

The  drop-down button has been added to the **A/R Invoice History Inquiry** header, which leads to Share Point to view the documents of the following Libraries: **Sales Invoices, Pick Tickets, A/R Checks** and **Customer PO**. The user can select the desired library from the list or just click on the button without opening the list. The first library listed in the drop-down menu will be selected by default.



**A/R Invoice History Inquiry (ABC) 1/9/2013**

Invoice No. 0100033 Type INV Date 4/15/2010  
 Source S/O Order No. 0000153

Customer No. 01-ABF Ship To American Business  
 Source Journal RMA No.

Terms Code 01 Net 30 Days Ship Date 4/13/2010  
 Ship Via UPS BLUE Schedule W1  
 FOB Customer PO XX-890200 Ship Zone A Weight 4  
 Salesperson 01-0100 Jim Kentley Apply To  
 Confirm To Artie Johnson IT User ID  
 Comment  
 E-mail  
 Fax Batch Fax  
 Check No. 010255

Taxable	1,075.85
Nontaxable	.00
Freight	6.00
Sales Tax	52.72
Discount	21.52
Invoice Total	1,113.05
Deposit	500.00
Net Invoice	613.05

Balance 243.05

**Sales Invoice** – If no Invoice is selected, all the documents will be listed in Share Point, otherwise, if an Invoice No is selected then only the documents will be listed which are related with that Invoice.

**Pick Tickets** – If no Order is selected, all the documents will be listed in Share Point, otherwise, if an Order No is selected then only the documents will be listed which are related with that Order.

**A/R Check** – If no Invoice is selected, all the documents will be listed in Share Point, otherwise only the documents will be listed which refer to current Customer No and Invoice No.

**Customer PO** – The same as **Pick Tickets**.