What's New in Sage 300 Document Management System 2014 ?

DMS 2014 contains a modified version of one or more DMS program components.

New features and enhancements

The following sections describe new features and feature enhancements that have been included in DMS 2014 (DMS 6.2) version.

DMS 2014 is fully compatible with Sage 300 ERP 2014

DMS 2014 Uses the Same New Sage 300 ERP 2014 Icons

DMS module now uses the same Icon and screens that Sage 2014 uses

Drill Down From DMS Accounts Payable Invoice Entry to DMS Purchase Order Invoice Entry

This update allows users to drill down (Using the drill down button) from DMS Accounts Payable Invoice to DMS Purchase Order invoice screen.

Drill Down From DMS Accounts Receivable Invoice Entry to DMS Order Entry Invoice

This update allows users to drill down (Using the Drill down button) from DMS Accounts Receivable Invoice to DMS Order Entry invoice screen.

Drill down from DMS Order Entry Invoice screen to Order Entry Shipment Screen

This update allows users to drill down (Using the drill down button) from DMS Order Entry Invoice screen to the DMS Order Entry shipment screen.

Drill down from DMS Order Entry Shipment screen to Order Entry Screen

This update allows users to drill down (Using the drill down button) from DMS Order Entry Shipment screen to the DMS Order Entry screen.

Able to View AP Invoice from Payment Entry

In DMS AP payments screen there is an option to view Documents such as AP Invoices, so the user reviewing the payments can view the AP invoices from the payment entry screen without going into the DMS screen of AP Invoice.

DMS Support for Requisition Entry Screen of Purchasing Workflow module

The DMS 2014 version allows users to have DMS features on the Requisition Entry screen of the Purchasing Workflow Module, The DMS Requisition screen is under the DMS Purchasing Workflow folder and is licensed as part of DMS Purchase order module, so no additional DMS license is required. The DMS approval console icon has also been added to drill down to the DMS Requisition Screen. Clients using Visionetix DMS don't require the additional module of Workflow Documents to use the Purchasing Workflow module.

Upgrading to DMS 2014

The Product update contains the full DMS installation, If existing the current DMS software will need to be uninstalled prior to installing DMS 2014

1. First backup the "web.config" file under Inetpub**wwwroot\DMS**
2. Then using windows add/remove feature remove the Visionetix Software – *Document Management System 5.6A* and *Visionetix Software – Document Management System server*
3. Run the DMS_Setup.exe installation package, at the end of the installation it will prompt to upgrade the DMS Database and install the DMS server
4. Copy from backup the Web.config file into **Inetpub\wwwroot\DMS** or re-enter the DMS database connection details from the DMS setup screen
5. To configure emailing for DMS, login to Sage 300 and go to DMS setup and select "Configure email" in this screen enter the DMS database server, DMS database (DMS_DAT) and SQL user name and password, you can also enter the default email template.

For more information, please refer to the DMS 2014 user guide.

Important:
This product update contains database changes to allow new DMS features in Purchasing Workflow, after installation of the DMS database schema it will need to be updated. This can be done at the time of installation or by manually running the "DMSDatabaseSetup.exe" from the VX62A folder. The existing DMS database should be backed up first

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