



PRODUCT OVERVIEW

QUICK VIEWING AND EASY ACCESS OF DOCUMENTS IN SAGE 100 ERP

InstaDocs is the first and only embedded document management solution designed for Sage 100 ERP. This unique document storage solution allows electronic documents to be stored, viewed and accessed directly within Sage 100 ERP, and provides easy access to documents relating to specific records. Save time and increase productivity with InstaDocs.

KEY BENEFITS



Easy Access: Store, view, access, search, and share important documents that relate to specific records in Sage 100 ERP, such as Customers, Vendors, Items, Sales Orders, Purchase Orders, GL Journals, Jobs, Employees, Work Tickets, RMA, Lot/Serial and DSD Service Orders.



Document Tagging: As documents are stored, they may also be “tagged” with specific keywords. Once tagged, users can search all stored documents based on specific keywords.



Master Search: This feature allows users to search all documents based on File Name, Keywords and Document Source.



Paperless Office Integration: Checks, Orders, Invoices, and Statements are automatically stored in PDF format within the appropriate Vendor or Customer directory.



Security: Specific user security privileges can be defined and applied for each module.



Cloud Storage: InstaDocs is designed to interface directly with Microsoft’s OneDrive cloud storage product. By combining InstaDocs and OneDrive, documents are readily available for easy access and display in the cloud.

12 SAGE 100 MODULES

Instadocs is available for the following Sage 100 modules: Accounts Payable, Accounts Receivable, Inventory Management, Purchase Order, Sales Order, Job Cost, Payroll, RMA, General Ledger, Lot / Serial, Production Management and DSD Service Center.

DOCUMENTS PANEL

The Documents Panel is embedded into various Sage 100 ERP Maintenance, Inquiry, and Data Entry programs. As each record is accessed, the corresponding documents are displayed. Users have the ability to drag and drop documents, select documents for editing and tag documents with unlimited keywords. With InstaDocs, documents are at your fingertips!

