



“We make it easy!”

iDox2

Document Management for Sage PFW (AR/OE)

Tired of seeing file cabinet after file cabinet against the wall? Spending too much time finding documents? Now you can link important documents to either the originating Order or to the Invoice you create when the items ship and you enter or transfer it into Accounts Receivable. iDox2 for Sage PFW was designed to take advantage of low storage costs, using the power of Adobe Acrobat Reader®, and Sage PFW's management of your receivables. iDox2 makes it easy to save, link and retrieve documents.

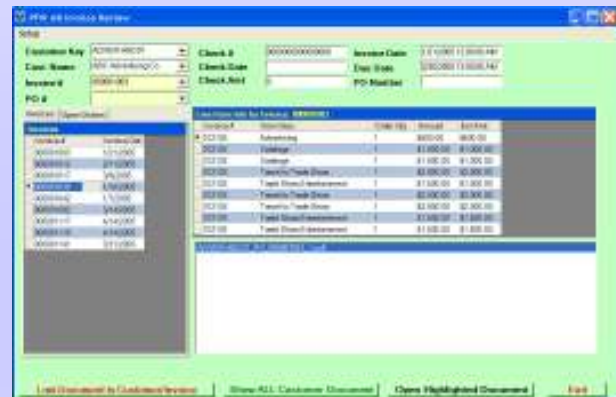
Step One - Scanning Documents

With either the scanner in your copier machine or a sub \$200 scanner, you can scan your documents to a directory (local or network) and iDox2 will take it from there. You don't need to worry about what name the scanning software will give the document, iDox2 will reorganize and rename it quickly and easily.

Step 2: Linking the Document:

You select the vendor and from here you have three choices. You can link the document to 1) just the customer, 2) select an invoice and link the document to a customer/invoice, or 3) select an Order and link the document to a customer/Order.

Click on 'Link Document' and iDox2 knows where you scanned the document. You select the file and iDox2 then renames the scanned document with the customer key and either the invoice number or Order number. Next, iDox2 creates a directory exclusively for the customer and moves the document into the folder. (iDox2 allows up to 99 documents per invoice and 99 documents per Order.)

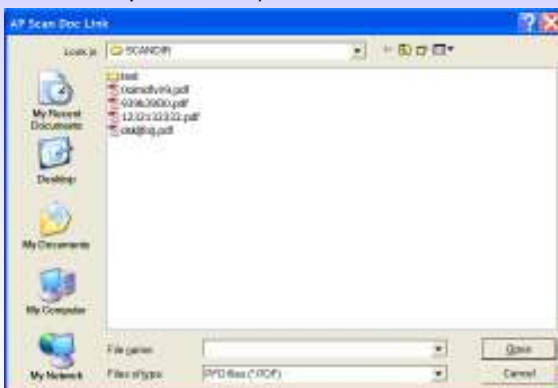


That's all there is to it! You are on the path to fewer filing cabinets!

About Dynamic Business Solutions

Established in 1995, Dynamic Business Solutions develops, supports and markets industry specific applications that integrate to leading packages such as Sage Software's Sage PFW, Sage Abra and ACT!. DBS products are used in manufacturing, hospitality and non-profit organizations.

An authorized reseller for Sage Software, DBS and its developers and experienced professionals are dedicated to developing client focused solutions.



Dynamic Business Solutions
1035 Hinesburg Road
South Burlington, VT 05403
802.383.1600
www.D-B-S.com



“We make it easy!”

iDox2

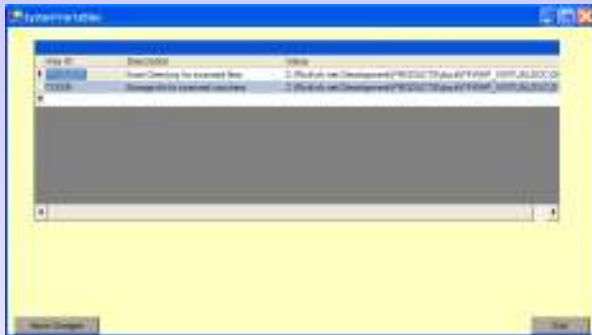
Document Management for Sage PFW (AR/OE)

Step 3: Retrieving Documents

There are 2 ways to retrieve documents with iDox2.

- a) If you store the documents on a network drive, you can share this in a read-only mode and all users can browse the directory and find documents quickly, because the storage directory is organized by vendor key. A simple double click on the document(s), and you can review at the privacy of your desk.

- b) Within iDox2, we allow you full access to the documents quickly and easily. Select a customer and all the documents for that customer show up immediately. Select an Order and the documents linked exclusively to that Order are displayed. Select an Invoice and all the documents linked to that invoice are displayed as well as all documents that are associated with the original Order. A simple select and click of ‘Open Highlighted Document’ and Adobe Acrobat Reader © will launch, displaying your information immediately.



Setup is a snap! You tell iDox2 where you want the documents stored!

Setup is a snap!

All the configuration and setup is at your fingertips. We need 3 components to make your headaches go away:

1. An ODBC connection to your Sage PFW company data.
2. A directory to store the scanned images in PDF format.
3. A directory to store the linked documents.

We provide ‘Relink’ on the program menu to associate iDox2 with your company information. Tell us the name of your ODBC DSN and in 20 seconds iDox2 is reading your company information.

From within iDox2, you click on ‘Setup’ and tell us where the directories are for the scanned images and the linked document storage.

System Requirements

Windows 2000 or Windows XP

.Net Framework 1.1 and SP1

ODBC connection to the SAGE PFW company data

Adobe Acrobat Reader © V5.0 or higher



Dynamic Business Solutions
1035 Hinesburg Road
South Burlington, VT 05403
802.383.1600
www.D-B-S.com