Infotech Document Management



User Guide

Locate the Installer

1 To locat https://	e the Infotech Doc businesscentral.d	ument Man <mark>ynamics.co</mark>	agement App, <mark>m/</mark>	navigate to	
2 Click the	e "Search" magni	fier icon to	open Business	Central's search pa	age.
			⊕ ^{Envir} Dem	onment P 🛱	? (17)
				2	
					^
Sales Order Sales Return Order	+ Sales Credit Memo > Tasks	> Sales> Reports	> History		_
					- 1
					- 1
					- 1
iredit M					

3 Type "Extension" and select Extension Marketplace which opens AppSource which is an online marketplace where you can find add-ons which you can use to customize and extend your experience within Microsoft Applications, such like Microsoft Dynamics 365 Business Central.

c. Sales∨ Purchasing∨ Inventory∨	Tell me what you want to do	2 ×		
Customers Item Journals Sales Journals	extension			
	Go to Pages and Tasks			
norning, Todd Tes	> Extension Management	Administration	+ Sales Credit Memo	> Sale
iorning, iouu ics	> Extension Marketplace	Administration	7 IdSKS	> veh
	> Extension Installation Status	Administration		
	Documentation			
	⑦ Search Help for "extension"			
Sales Orders Released Not Shipped	Get from Microsoft AppSource	Show all (51)		
	ARBENTIA Extension Management ARBENTIA Extension Management			
	 BRC Retail Extension BRC Retail Extension provides solution to manage item varia 	ints		
	Finance Extension (BE) Customize the Microsoft Dynamics 365 Business Central Finance	ance Module with the Finan		
Email Status	Didn't find what you were looking for? Try exploring pages and re	eports		
Email Activities	Pending Approvals Time Sheets	s Pending Time Sheets		
Failed Emails in Draft Emails in Sent En	ails Last Requests Sent Open Time	e Submitted Time	Rejected Time Approve	ed Time

Within AppSource, click in the "Search..." field. Type "Infotech" then click on the magnifying glass to search. Select Infotech Document Management "Free Trial" to kick off the installation wizard.

Microsoft AppSource	Apps 🗸	,∕⊃ infotech		$\times \rightarrow$
	✓ Industries ✓ Consulting Service	is 🗸 Partners 🗸		
Filters	Search results for "infotech			
♀ Search filters	Showing 35 results in apps. <u>Clear search</u>			
✓ Products				
✓ Categories	P	INFOTRCH	MOTICH	POINT
✓ Industries	Infotech Document	InfoTech Visitors	Covid19 App	D365FO for Cor
✓ Trials	Management Infotech Consulting Group	Management System	InfoTech (Pvt) Limited	Projects & AIA
< iniais	Business Central	SaaS	SaaS	Infotech
V Pricing Model	Drag & Drop documents/files directly into Business Central and save to your	InfoTech's Visitors Management System (VMS) is built on Microsoft .Net	InfoTech COVID-19 App	D365FO for Construction
✓ Ratings	cloud storage location.	Platform.	★ 5.0 (1 ratings)	AIA Reports Using Con
		K 5.0 (Tracings)		
	Free trial	Contact me	Contact me	Contact me
				ø
	eter Point	CONCERT POINT		SIGNULU
	Purchase Order Security	Employee Pay Slip	Room Booking	Signulu
	for Dynamics 365 EduFin IT, Inc. d/b/a Brightpoint	EduFin IT, Inc. d/b/a Brightpoint	Management Treta Infotech Private Limited	Millennium Infotech
	Infotech	Infotech	SharePoint	🕵 Outlook

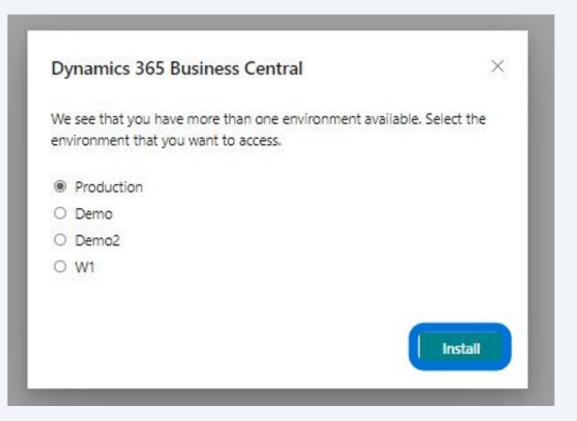
4

5 Confirm your details. Then select "Free trial". For any Microsoft AppSource app, confirmation of your information is needed. Once entered, click on "Free trial" again to open Business Central and the Infotech Document Management installation wizard. (NOTE: Your demo license will be valid for 30 days.)

Confirm your details to continue	×
Infotech Document Management By Infotech Consulting Group	
You're signed in as Todd Tester (todd@infotech-inc.com). <u>Edit your details</u>	
By clicking Free trial, I give Microsoft permission to use or share my account information so t me regarding this product. I agree to the provider's <u>terms of use</u> and <u>privacy policy</u> and under this product do not come from Microsoft, unless Microsoft is the provider. Use of AppSource <u>terms</u> and <u>privacy</u> .	erstand that the rights to use
	Free trial

Installation Wizard

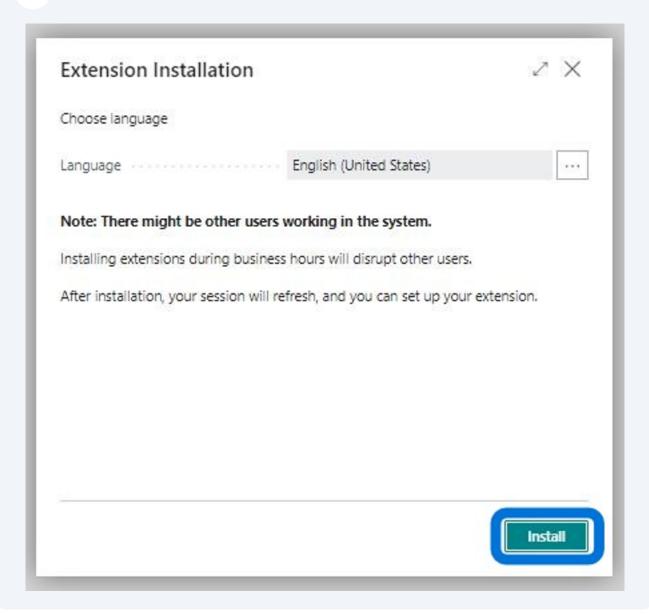
Select the environment you want Infotech Document Management extension installed in and then click "Install".



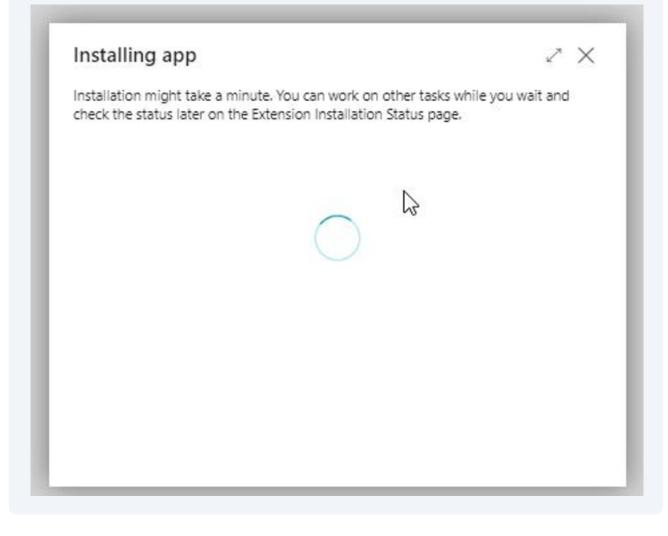
6

4

7 Choose the Language, then click "Install".



The following screen will appear showing the progress of the install. Once install finishes, a Installation complete message will appear.



8



=	Environment Demo
Sales Return O Sales Credit M Open Open > >	
Self-Service Time Sheets Pending Time Sheets	

10 You should see three Infotech options. Select "Infotech Document Management - Setup Wizard".

81	Go to Pages and Tasks	Show all (5)	
	> Infotech Document Management - Setup	Administration	
	> Infotech Document Management - Setup Wizard	Administration	
Not Shipped	> Infotech Document Management - Enabled Pages	Administration	
Partially Shipped	Documentation		
0	⑦ Search Help for "infotech"		
>	Get from Microsoft AppSource	Show all (17)	
	infotek Add-On Infrastructure Provides infrastructure layer for infotek add-ons. infotek	eklentileri için altyapı katmanı	
	 Intech Ecommerce Boost your business by selling online 		
Sent E 30 Day	Tax and Discount Management by Infotek Enables the user to invoice taxes and discounts even if t	hey are in a complicated structu	jected Time A eets Sl

11 Click "Next"

	+ Sales Quote + Sales Order + Sales Credit Memo	>
	Infotech Document Management - Setup Wizard $\ \ \nearrow \ imes$	
	Ęŷ	
25 Orders Released Not Shipped	Welcome to the Infotech Document Management Setup. Infotech Document Management allows you to drag-and-drop documents and e- mails directly onto your documents. This setup wizard will guide you through the setup in about 15 minutes.	
eady To Ship	Let's go! Choose Next to set up the license information.	
Draft Emails in Outbox Outbox	Back Next Finish Rejected Time Sheets Sheets	ed Tir

12 Click "Request Trial License" which will automatically populate the License Status field. Otherwise, copy and paste your paid license subscription key into the "New License Key" field.

t nosted sales	Actions + Sales Quote + Sales Order + Sales Invision + Sales Patrum Order	+ Sales Credit Memo → Tasks	> Sales
t posted sales s for \$21,581	Infotech Document Management - Setup Wizard 🛛 🖉 🔀	2 Idsks	> Reports
5 101 \$21,301	<u>دې</u>		
	Fill in your license information, or request a 30 day trial license with the button below.		
Sales Orders Released Not Shipped	New License Key		
Partially Partially Shipped O O	Current License Information License Status · · · · · · Trial License Active Expiration Date · · · · · 12/16/2022		
	End User License Agreement		
nail Status	Click here to view the End User Li ense Agreement (EULA) I have read and accept the ter		
ailed Emails in utbox Draft Emails in Outbox O D		Rejected Time Sheets O O	ed Time

13 Click "Click here to view the End User License Agreement (EULA)"

	Infotech Document Management - Setup Wizard $~~ \nearrow ~~ imes$	
	£Ô3	
	Fill in your license information, or request a 30 day trial license with the button below	r.
leased Not Shipped	New License Key]
Partially Shipped	Current License Information License Status	
_ 0	Expiration Date · · · · · · · · 12/16/2022	
>	End User License Agreement	
	Click here to view the End User License Agreement (EULA)	
	I have read and accept the ter	ets
Contractor		

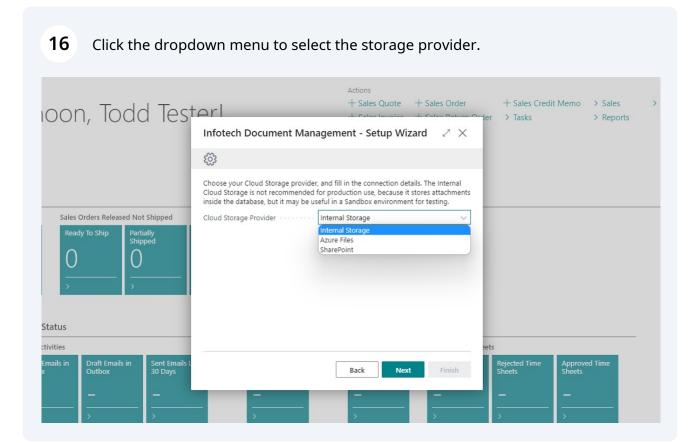
14 Click here to accept the End User License Agreement (EULA).

ester!	Actions + Sales Quote + Sales Order + Sales Invision + Sales Patrum Order	+ Sales Credit Memo > Sales
	Infotech Document Management - Setup Wizard $\ arsimes imes$	
	Fill in your license information, or request a 30 day trial license with the button below.	
Sales Orders Released Not Shipped	New License Key	
s - Ready To Ship Partially Shipped	Current License Information	
0 0	License Status	
	Expiration Date 12/16/2022	
	End User License Agreement	
	Click here to view the End User License Agreement (EULA)	
mail Status	I have read and accept the ter	
mail Activities	etc.	5
Failed Emails in Draft Emails in Sent Emails L Outbox Outbox 30 Days	Request Trial License Back Next Finish	Rejected Time Approved Time Sheets Sheets
0 0 0		0 0

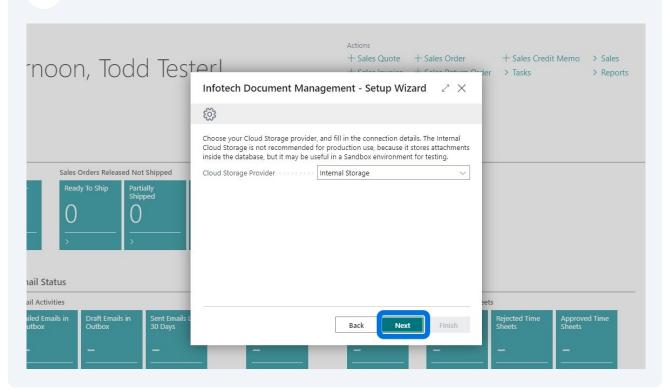
15 Click "Next"

ester!	L Calas Invoise L Calas Batura Order >		Sales Reports
	Infotech Document Management - Setup Wizard 🧷 🗙 ট্ট্র		
	Fill in your license information, or request a 30 day trial license with the button below.		
Sales Orders Released Not Shipped Ready To Ship O O O O O O O O O O O O O O O O O O O	Current License Information License Status Expiration Date 12/16/2022		
nail Status	End User License Agreement Click here to view the End User License Agreement (EULA)		
ail Activities iled Emails in utbox D Draft Emails in Outbox Outbox	I have read and accept the ter ets Request Trial License Back Next Finish O	ected Time Pets Approved T Sheets	ime

Cloud Provider



17 Click "Next"



Folder Structure

18 For each storage provider, choose the subfolder structure by selecting the dropdowns. Table Name and Primary Key are default.

ester!	Actions + Sales Quote + Sales Order + Sales Credit Memo > Sales + Sales Infotech Document Management - Setup Wizard 27 ×
Sales Orders Released Not Shipped	Folder Structure Set up your standard folder structure below. If you would like a different structure for some tables or pages, you can set that up later in the Infotech Document Management Setup.
Ready To Ship Partially O O > O	Subfolder 1 Table Name V Subfolder 2 Primary Key V Subfolder 3 V V Subfolder 4 V V
ail Activities Iled Emails in Utbox D Draft Emails in Outbox O D O Draft Emails in Outbox O O O O O O O O O O O O O O O O O O O	Date Separator · · · · · · · · · · · · · · · · · · ·

19 Click "Next"

rnoon, Todd Test	orl	Actions + Sales Quote	+ Sales Order	+ Sales Credit Me > Tasks	mo > Sales > Reports
	Infotech Document Ma	nagement - Setup Wiz	ard ∠ ×		
	ξ ^ζ ε		*		
Sales Orders Released Not Shipped	Folder Structure Set up your standard folder struct for some tables or pages, you can Management Setup.				
- Ready To Ship Partially	Subfolder 1	Table Name	~		
	Subfolder 2	Primary Key	~		
	Subfolder 3		<u> </u>		
> >	Subfolder 4		~		
	Date Separator	-			
nail Status	Date Format 1				
ail Activities	Date Format 2		▼ eets		
iiled Emails in Draft Emails in Sent Emails L outbox 30 Days		Back	Finish		pproved Time neets

Modules

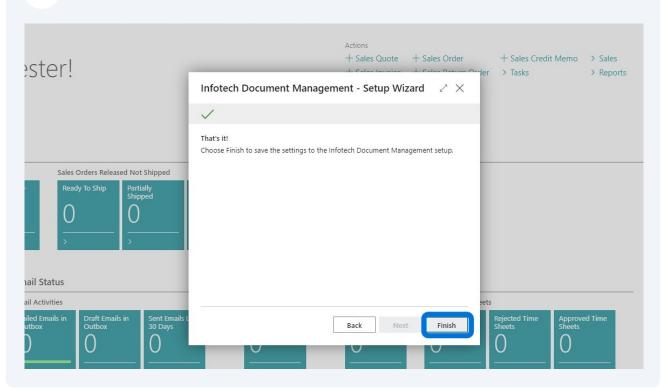
20 By default, document management is enabled for the following modules. Every page within these modules will have the drag and drop file management option.

ester!	Actions + Sales Quote + Sales Order + Sales Credit Memo > Sales + Sales Quote + Sales Order > Tasks > Reports Infotech Document Management - Setup Wizard 2 ×
	Select the modules that you want to enable for document management. You can always adjust these settings later in the Infotech Document Management Setup.
Sales Orders Released Not Shipped Ready To Ship Partially O O > >	Modules Finance Pages Sales and Marketing Pages Purchasing Pages Inventory Pages Inventory Pages
nail Status	Project Pages · · · · · · · · · · · · · · · · · ·
ail Activities iled Emails in utbox Draft Emails in Outbox O Draft Emails in Outbox O Draft Emails in Outbox O Draft Emails in O Draft Emails in Draft Emails in O Draft Emails	Resource Pages

21 Click Next.

ester!	Actions + Sales Quote + Sales Order + Sales Credit Memo > Sales + Sales Invision + Sales Poter > Tasks > Reports
	Infotech Document Management - Setup Wizard 🖉 🗙
	<u>ب</u>
	Select the modules that you want to enable for document management. You can always adjust these settings later in the Infotech Document Management Setup.
Sales Orders Released Not Shipped	Modules
- Ready To Ship Partially Shipped	Finance Pages · · · · · · · · · · · · · · · · · · ·
0 0	Sales and Marketing Pages · · · · · O
	Purchasing Pages
>	Inventory Pages
	Manufacturing Pages · · · · · · · · •
nail Status	Project Pages · · · · · · · · · · · · · · · · · · ·
ail Activities	Resource Pages · · · · · · · · · · · · · · · · · · ·
iiled Emails in Draft Emails in Sent Emails L utbox Outbox 30 Days	Back Next Finish Rejected Time Approved Time Sheets Sheets
0 0	

22 Click "Finish"



Advanced Setup Options

23 Click "Search..." magnifying glass.

≡		⊕ Environm Demo	ent P C	ı ©	? (17)
Actions + Sales Quote + Sales Order + Sales Invoice + Sales Return Order		> History			
Returns Sales Return O Open O					

24 Type "Infotech". Select "Infotech Document Management - Setup" to open the setup page which allows you to modify settings in the Infotech Document Management app.

rs Item Journals Sales Journals	infotech			
	Go to Pages and Tasks	Show	v all (5)	
ter!	> Infotech Document Management - Setup	Administration	+ Sales Credit Memo > Sales	-
	> Infotech Document Management - Setup Wizard	Administration	> Tasks > Repo)rts
	> Infotech Document Management - Enabled Pages	Administration		
	Documentation		-	
	⑦ Search Help for "infotech"			
Sales Orders Released Not Shipped Ready To Ship Partially	Get from Microsoft AppSource	Show	all (17)	
Shipped	infotek Add-On Infrastructure Provides infrastructure layer for infotek add-ons. Infote	k eklentileri için altyapı katmanı		
· · ·	 Intech Ecommerce Boost your business by selling online 			
	Tax and Discount Management by Infotek Enables the user to invoice taxes and discounts even if	they are in a complicated struct	J	
Status	Didn't find what you were looking for? Try exploring pages a	and reports	_	

License Information Setup

25 When a trial license expires, a notice will appear at login, indicating that the trial license expired.

 Contacts
 Opportunities
 Sales Quotes
 Sales Orders
 Customers
 Items
 Active Segments
 Logged Segments
 Campaign

 ×
 Your trial license for Infotech Document Management has expired. Please contact Infotech Consulting Group to order a license.
 Contact

26 If a trial license has expired and a new paid subscription license has been received, search for Infotech Document Management - Setup within Business Central and select "Enter New License Key" under the Home menu.

Infotech Docum	ent Management - Se	etup
Home Tables/Pages Actions ~	Automate 🗸 Fewer options	
🔒 Request Demo License Key 🔒 En	ter New License Key	×2
Request Demo License Key En License Information	ter New License Key	Â
		×2

27 Paste the new license key in the field below.

💼 Request Demo	o License Key 🔒 Enter New License K	(ey		Ŕ
License Inform	ation			
Demo License		License Expiration Date	5/31/2024	
Business Central Te	na msft1a6720t66257678	No. of Active Users		4
Folder Structu	Conoral			
Folder Structu	General			
Folder Structu File Handling)	General New License Key			

28 To confirm the license details, click on the "License Information" header to expand.

Home Tables/Pages Actions ~	Automate - Fewe	er options		
🔒 Request Demo License Key 🔒	Enter New License Key			冷
License Information				
Demo License		License Expiration Date	5/31/2024	
Business Central Tena msft1a6720	t66257678	No. of Active Users		4
Susiness Central Tena msiciao/20	100257070	NO, OF ACTIVE USERS		-

At any point, to confirm license key is active, click on Actions menu and select "Check License Key". License Check Successful message will display if active.

	C	? & + 1	~	∕Saved 🗍 ⊑ ,
Infotech	Document	Managemer	nt - Setu	ıp
Home Tables/Pages	Actions \lor Automate	e ∨ Fewer options		
🔒 Request Demo Lio	cens 🔒 Check License Key	e Key		,
License Information	on	Request Demo License Ke Enter New License Key	ey	
B			ite 5/31/2024	4
Demo License		✓ Use short menu		

Cloud Storage Setup

30 Expand Cloud Storage header to view Cloud Storage information. Select the provider and update the additional fields as necessary.

Infotech Document Management - Setup

Request Demo Licer	nse Key 🔒 Enter New Licens	ie Key 🔗
License Informatio	n>	
Cloud Storage		
Cloud Storage Provider	SharePoint	SharePoint Information
	Internal Storage Azure Files	Configuration Instructions
	SharePoint	Azure Tenant Id c3ed0232-7987-4a4e-9dba-dc076
		SharePoint Client Id dcc2d57b-43ed-48df-97a6-6c570
		SharePoint Client Secr
		SharePoint Site Name · · · Infotech Document Managen · · ·
		SharePoint Drive Name · · Documents · · ·

Folder Structure Setup

31 Expand the Folder Structure header and click a dropdown to select a different subfolder structure.

Folder Structure				Show less
Subfolder 1 · · · · · · · · ·	Table Name	\sim	Date Format 1 · · · · · ·	
Subfolder 2	Primary Key	~	Date Format 2 · · · · · ·	
Subfolder 3 · · · · · · · [\sim	Date Format 3 · · · · · ·	
Subfolder 4 · · · · · · · ·		\sim	Date Format 4 · · · · · ·	
Subfolder 5 · · · · · · · ·		\sim	Date Format 5	
Subfolder 6 · · · · · · · ·		\sim	Date Format 6	
Subfolder 7 · · · · · · ·		\sim	Date Format 7 · · · · · ·	
Subfolder 8 · · · · · · · ·		\sim	Date Format 8 · · · · · ·	
Date Separator	-			

32 To modify the folder structure within a specific table or page, click "Tables/Pages " menu and select one of the options highlighted below. NOTE: If any changes occur in the folder structure than what was initially setup, user is responsible for moving the files to the new cloud storage provider.

Infotech Document Management - Setup

Table/Page Folder Structure	III Table/Page Editable M	odes 🔄 Enabled Pages	-2-
Subfolder 3 · · · · · · ·	~	Date Format 3 · · · · · ·	
Subfolder 4 · · · · · · · ·	~	Date Format 4 · · · · · · ·	
Subfolder 5	~	Date Format 5 · · · · · · ·	
ubfolder 6	\sim	Date Format 6	
ubfolder 7 · · · · · · · ·	\sim	Date Format 7 · · · · · ·	
ubfolder 8 · · · · · · · ·	~	Date Format 8 · · · · · · ·	
Date Separator · · · · · ·			

33 Within Table/Page Folder Structure, click "New" to create a new structure or "Manage" to edit an existing.

, P Search (+	New Manage					@ 7 I
Table No. †	Table Name	Archive Folder	Subfolder 1	Subfolder 2	Subfolder 3	Subfolder 4

34 When selecting "New", select a table and define the folder structure.

G G	ieneral			
Ta	ble No.	0 ~	Archive Folder	
Ta	ible Name			
F	olders			Show les
Si	ub folders		Fields	
Si	ubfolder 1 · · · · · · ·	\sim	Field No. 1	
S	ubfolder 2	\sim	Field No. 2	
Si	ubfolder 3	~	Field No. 3	
Si	ubfolder 4	~	Field No. 4	
S	ubfolder 5	~	Field No. 5	
S	ubfolder 6 · · · · · · ·	~	Field No. 6	
S	ubfolder 7 · · · · · ·	~	Field No. 7	
S	ubfolder 8 · · · · · · ·	~	Field No. 8	
D	ates			
D	ate Format 1 · · · · · · ·			
D	ate Format 2 · · · · · ·			
D	ate Format 3 · · · · · ·			
D	ate Format 4 · · · · · · ·			
D	ate Format 5 · · · · · ·			
D	ate Format 6 · · · · · · ·			
D	ate Format 7 · · · · · ·			

File Handling Setup

	SharePoint Site Name Infotech Document Managen
	SharePoint Drive Name Documents
Folder Structure >	
File Handling	
Show Duplicate File D	Restructure Folders
Show Created Column	Delete Empty Folders \cdots 💽

Modules and Copy Document Setup

37 To include Infotech Document Management in a specific module, click on the slider button to enable or disable.

Date Separator · · · · · · -		
File Handling		
Show Duplicate File 🔹 🌅	Show Created Column	
Modules		
Finance Pages · · · · · · ·	Project Pages	
Sales and Marketing 🔹 🦲	Resource Pages · · · · · · ·	
Purchasing Pages · · · · · O	Service Pages	
Inventory Pages · · · · · · ·	Human Resource Pag	
	Warehouse Pages	

38 To copy attachments during Sales or Purchase Copy Document actions, click on the slider button to turn on or off the feature.

eatures	
Sales Copy Documents 🐳 🦲	Purchase Copy Docu

39 Within Table/Page Folder Structure, if a row already exists, highlight the row and click "Manage".

, Search	+ New <u>Manage</u>				┢ ७ ≣
Table No. 1	Table Name	Archive Folder	Subfolder 1 Subfolde	er 2 Subfolder 3	Subfolder 4
<u>3</u>	: Payment Terms		Table Field		

40 Selecting "New" will allow you to select table and subfolder options as seen in the screenshot. To return to the previous screen, select the Left arrow in the upper left hand side of the screen.

Show more

23

41 When selecting Manage, click "Edit" to adjust the selected row.

÷	Infotech Document Management - Table/Page Folder Structure L	ist	
0(☞ 7 ≡
A	Celit View 🗊 Delete		KJ-
Prim	<u>3</u> : Payment Terms	Table Field	
-			
_			
-			

42 Modify settings as needed.

¢	- Infotech Documer	Table Folder Structure Card	+ 🗊 🗸 Saved	d 2
otec		3 · Payment Terms		
s Tables	Table No. 🕈	General		Sales > History
der 2 · · · ·	3	Table No. · · · · · · · · 3 · ·	Archive Folder	> Reports
der 3 ····		Table Name · · · · Payment Terms		
der 4 · · · ·		Folders	Show	v less
der 6 · · · ·		Sub folders	Fields	
der 7 · · · ·		Subfolder 1 · · · · · · Table Field · · ·	Field No. 1 · · · · · Discount %	
der 8		Subfolder 2 · · · · · · · · · · · · · · · · · ·	Field No. 2	
eparator -		Subfolder 3 · · · · · · · · · · · · · · · · · ·	Field No. 3	
land Cara		Subfolder 4 · · · · · · · · · · · · · · · · · ·	Field No. 4	
landling		Subfolder 5 · · · · · · · · · · · · · · · · · ·	Field No. 5	
Duplicate Fil		Subfolder 6 · · · · · · · · · · · · · · · · · ·	Field No. 6	
		Subfolder 7 · · · · · · · · · · · · · · · · · ·	Field No. 7	
lles		Subfolder 8 · · · · · · · · · · · · · · · · · ·	Field No. 8	
e Pages		Dates		ved Time
nd Marketii		Date Format 1 · · · · · ·		
sing Pages		Date Format 2 · · · · · ·		
ony Pages		Date Format 3 · · · · · ·		
		Date Format 4 · · · · · ·		

43 To modify mode	s, click "Table/Page	Editable Modes".		
Infotech Doc	\bigcirc	+ 🖻 nagement - S	√saved Setup	□ □ 2
Process <u>Tables/Pages</u> Acti	ions ∨ Automate ∨ Fe			-63
Subfolder 3	~	Date Format 3		
Subfolder 4	~	Date Format 4 · · · · · ·		
Subfolder 5	~	Date Format 5		
Subfolder 6	~	Date Format 6		
Subfolder 7 · · · · · · ·	~	Date Format 7		
Subfolder 8 · · · · · · · ·	~	Date Format 8 · · · · · ·		
Date Separator · · · · ·				

44 Select one of the following choices based on whether creating a new mode or editing/deleting an existing.

⊃ Search + New	🔛 Edit List	🗊 Delete				\$ 7 ≣
User ID 1		Table No.↑	Table Name	Page No. 1	Page Name	Editable Mode
	~	0		0		All

45 To create a new or edit an existing mode, click the drop down next to the first entry or the mode you want to edit. Select the necessary mode details and then click the back arrow to return to the previous page.

(Infotech Docu	iment Management - Table/F	Page Editable Moo	les				
ech Do	, ○ Search	+ New 💀 Edit List	🗊 Delete				\$ 7 ≣	
ables/Pages A	User ID 1		Table No.↑	Table Name	Page No. †	Page Name	Editable Mode	> Sales
Prim	→	~	0		0		All	> Reports
* * * * * * * * * *		User Name						
		AVNEET.S			^			
	_	KEN.L TODD						
· · · · ·		TAMMY						
		BECKY.O						
				Select fro	m full list			
Dr								
ing								
ite File D								

46 To enable or disable Infotech Document Management, select "Enabled Pages". 4 🖉 🖻 + 🛍 √ Saved Infotech Document Management - Setup Home Tables/Pages More options Enabled Pages I Table/Page Folder Structure I Table/Page Editable Modes sà Executes the Enabled Pages action. License Information > Cloud Storage > Folder Structure > File Handling >

47 Select "+New". Specify a "Page No." which should auto populate the Page Name and Module fields. Finally check the "Enabled" box.

-	_			
	H New 💀 Edit List	w 🐺 Edit List 🗻 Delete		
	Page No.	Page Name	Module †	Enabled
\rightarrow	0			
	16	Chart of Accounts	Finance	
	17	G/L Account Card	Finance	
	18	G/L Account List	Finance	
	20	General Ledger Entries	Finance	
	370	Bank Account Card	Finance	
	371	Bank Account List	Finance	

48 To edit an existing page, select "Edit List" and check or uncheck the "Enabled" box on that Page No. line. When checked, Infotech Document Management will appear on that page. When unchecked, Infotech Document Management will not appear on the referenced page.

, P Sear	rch 🛛 🕂 New 🔛 Edit List	🗊 Delete		67 =
	O Page	No. Page Name	Module †	Enabled
	16	Chart of Accounts	Finance	
	17	G/L Account Card	Finance	
	18	G/L Account List	Finance	
\rightarrow	<u>20</u>	General Ledger Entries	Finance	
	370	Bank Account Card	Finance	<u>ت</u> ک
	371	Bank Account List	Finance	
	372	Bank Account Ledger Entries	Finance	
	374	Check Ledger Entries	Finance	v
	1600	Pank Danasit	Figners	F 2

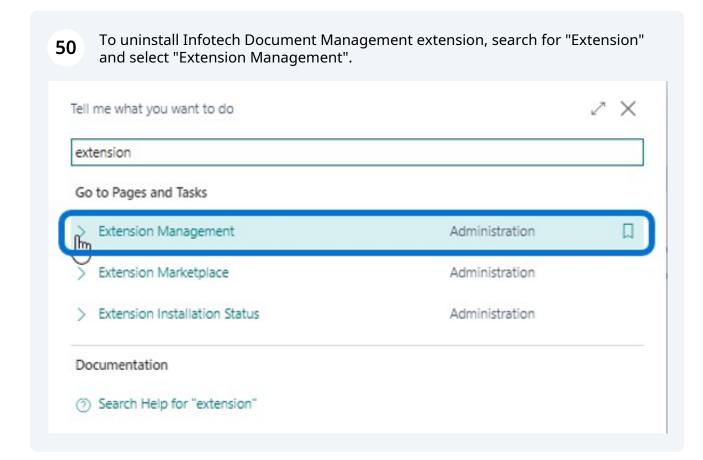
Made with Scribe - https://scribehow.com

If a license key is received, click "Enter New License Key" if a subscription license has been requested.

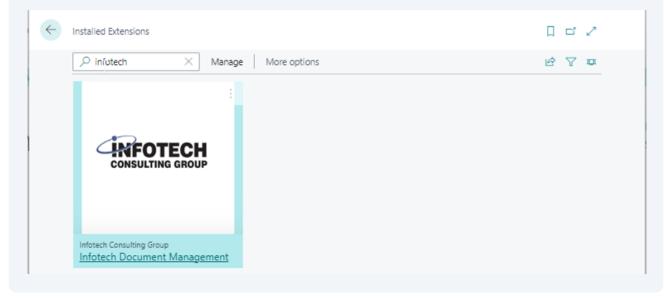
Process Tables/Pages	Actions \sim Automate \sim Fewer options		
License Information	Request Demo License Key		
	a Enter New License Key		10/16/2022
Demo License	Check License Key	License Expiration Da	12/16/2022
Cloud Storage	Use short menu		
Cloud Storage Provid S	harePoint ~	SharePoint Information	
		Azure Tenant Id	c3ed0232-7987-4a4e-9dba-dc
		SharePoint Client Id	2ab87af6-5e2e-4a72-b7cd-260
		SharePoint Client Sec	
			<u></u>

Uninstall

49



51 In the list of installed extensions, search for "Infotech Document Management". Confirm that the one you want to uninstall is highlighted with a blue background as seen below.



52 Click the 3 ellipses in the upper right hand corner of the extension and select "Uninstall".

₽ infotech	× Manage More options
	Manage
(IPe	[₽] Install
CONSU	3× Uninstall
	🔭 Unpublish
	🕞 Set up
Infotech Consultin	Download Source
Infotech Docu	1 Learn More

53 The uninstallation wizard will begin. Remember to slide the toggle switch on to delete extension data along with the extension.

Extension Uninstallation	1 13	X
Uninstall Extension		
Uninstall extension to remove adde	d features.	
Name	Infotech Document Management	
Description	With Infotech Document Management, your documents, files, photos and videos	-
	are connected right where they need to be – you don't have to search your file structures. Items have pictures, Purchase	•
Version	22.0.2.0	
blisher · · · · · · · · · · · · Infotech Consulting Group		
App ID	dfd0f6ae-c770-4954-8023-91d89ec523f3	
Published As	Dev	
Delete Extension Data		
	Unin	stall

Support

54 For support, feel free to submit a request using Infotech Consulting Group's contact form at <u>https://www.infotech-inc.com/contact/</u> or phone us directly using the Main Office, Onalaska, Wisconsin contact number below.

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со	NTACT	
	Corporte Address: Infolsch Consulting Group 1062 Oak Forest Dr Onalaska, Wi 36503 Phon: Main Office: Onalaska, Wisconsun – (609) 783-1110 Colorado Spring, Stolardo – (660) 463-663 Indianapolis, Indiana – (877) 783-2112 Las Vegas, Nevada – (877) 783-212 Las Vegas, Nevada –	Contact Form Name Phone Number Email Tule Company How can we help?
		In not a robot