kwiktag
by enChoice

Document Management for Dynamics 365

Manage Your Documents Inside Dynamics D365 or Anywhere

KwikTag for D365 is the only document management system that is directly integrated to more than 80 D365 screens. It's the only Enterprise Content Management (ECM) system your ERP users will ever need. Capture any document whether paper or digital and find or share it from within D365 or in KwikTag.

KwikTag online access allows your non-D365 users to get the information they need. Beyond document management, you can add powerful workflow solutions to automate any business process.

ERP Integrated or Stand-Alone
Dynamics-integrated and stand alone document management

Document Access in D365
Easily access scanned paper or electronic files from Dynamics D365

Related Documents
See all related documents in KwikTag whenever you need them

Case Management
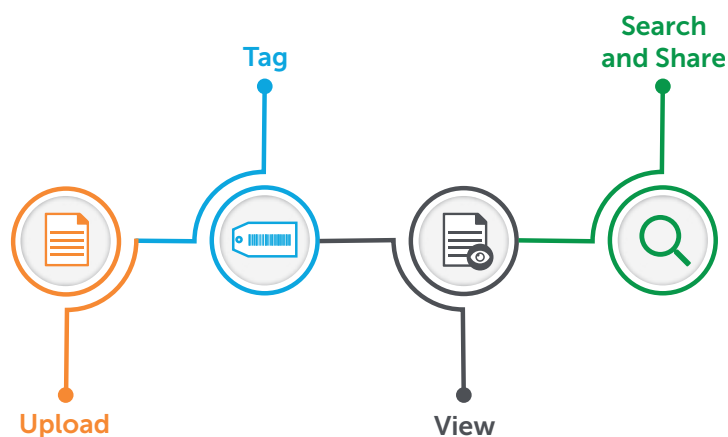Secure, 360-degree view of all associated documents in any department

Increase Productivity
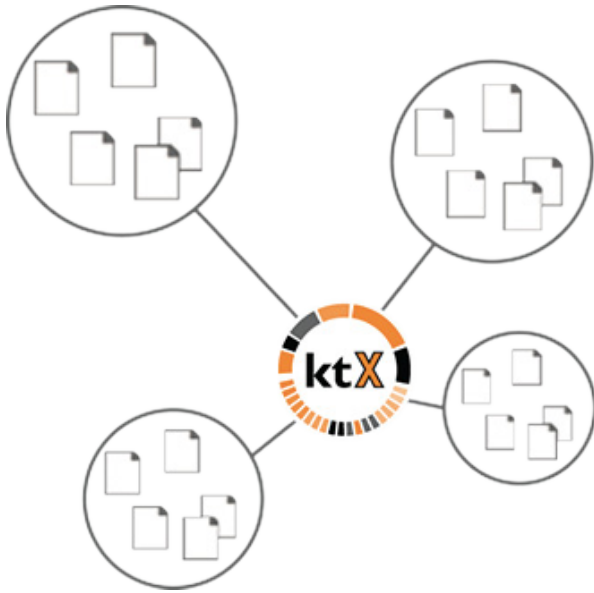Stop chasing or filing paper documents, start with digital and save time

Anywhere Access
Online access for both ERP and non-ERP users to find, view and share documents

How KwikTag for D365 Works

Tag
Search and Share
Upload
View

With KwikTag for D365, your D365 users can associate documents to D365 transactions quickly and easily. Select the "Tag" menu item from D365 forms to capture paper or electronic files. Scan your paper documents at your convenience, and KwikTag automatically associates them with the right D365 transaction. For electronic files, simply drag-and-drop to the D365 form. Over 80 D365 forms are available out of the box.

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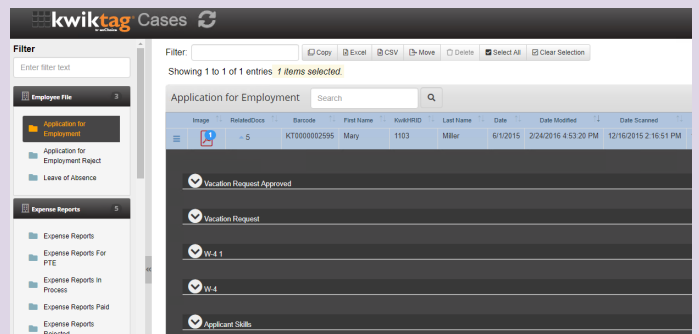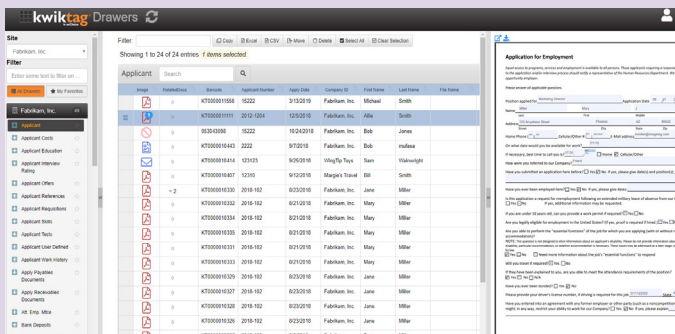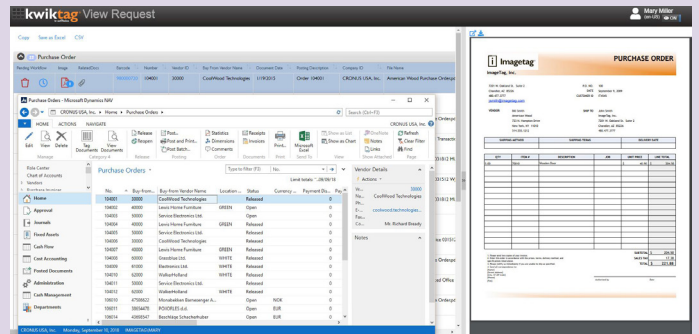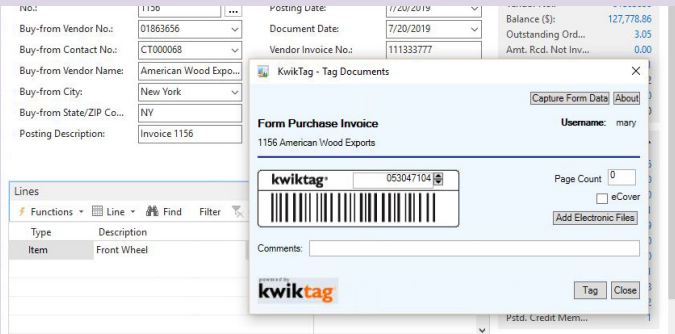# Go further with these additional KwikTag solutions for D365

KwikPayables

Automate AP invoice
workflow approval

KwikExpense

Automate reimbursable and
corporate credit card expenses

KwikTag for D365 Screenshots

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D365 Forms Enabled for KwikTag

Over 80 standard D365 forms are enabled for KwikTag, and additional forms can be mapped for KwikTag integration. Below are the screens/forms enabled by default.

Accounts Payable

- Global Invoice Journal
- Inquiries and Reports -> Product Receipt
- Invoices -> Invoice Journal: Lines
- Invoices -> Open Vendor Invoices
- Invoices -> Pending Vendor Invoices
- Invoices -> Pending Vendor Invoices: Open Item
- Orders -> All Return Orders
- Orders -> All Return Orders: Open Item
- Payments -> Payment Journal: Lines
- Purchase Orders -> All Purchase Orders: Edit
- Purchase Orders -> Purchase Order Lines: Inventory / View / Transactions
- Purchase Orders -> All Purchase Orders
- Purchase Orders -> Purchase Orders Received but Not Invoiced
- Vendors -> All Vendors - Invoice
- Vendors -> All Vendors - Vendor / Transactions
- Vendors -> All Vendors Or Vendors On Hold
- Vendors -> Vendors Past Due

Accounts Receivable

- Customers -> All Customers
- Customers -> Transactions
- Customers -> Invoice Journal
- Inquiries and Reports -> Invoice History
- Invoices -> All Free Text Invoices
- Orders -> All Sales Orders
- Orders -> All Sales Orders: Open Item
- Payments -> Payment Journal: Lines

Cost Management

- Manufacturing Accounting -> Production Orders

Credit and Collections

- Collection Letter -> Collection Letter Journal

Fixed Assets

- Fixed Assets

General Ledger

- Inquiries And Reports -> Voucher Transactions
- Inquiries And Reports -> Voucher Transactions
- Journal Entries -> General Journal: Lines

Human Resources

- Courses
- Loan Items -> Loaned Equipment

Human Resources

Performance

- Goals
- Reviews

Human Resources

Workers -> Employees

- Employees
- Compensation / Performance
- Compensation / Certificates
- Compensation / Courses
- Compensation / Education
- Compensation / Positions of trust
- Compensation / Professional experience
- Compensation / Project experience
- Compensation / Skills
- Compensation / Leave
- Compensation / Terms of employment
- Compensation / Accomodations
- Compensation / Benefits
- Injury And Illness

Procurement and Sourcing

- Purchase Orders -> Purchase Order Confirmation
- Purchase Orders -> Receiving Products -> Packing Material Transactions
- Receiving Products -> Receipts List

Production Control

- All Production Orders

Sales and Marketing

- Sales Order Confirmations
- Order Shipping -> Packing Material Transactions
- Order Shipping -> Packing Slip
- Order Shipping -> Picking List
- Order Shipping -> Picking List Registration
- Order Shipping -> Shipping Specifications
- All Sales Quotations
- All quotations: Open Item