

# cc|document management system

## Registration and Setup

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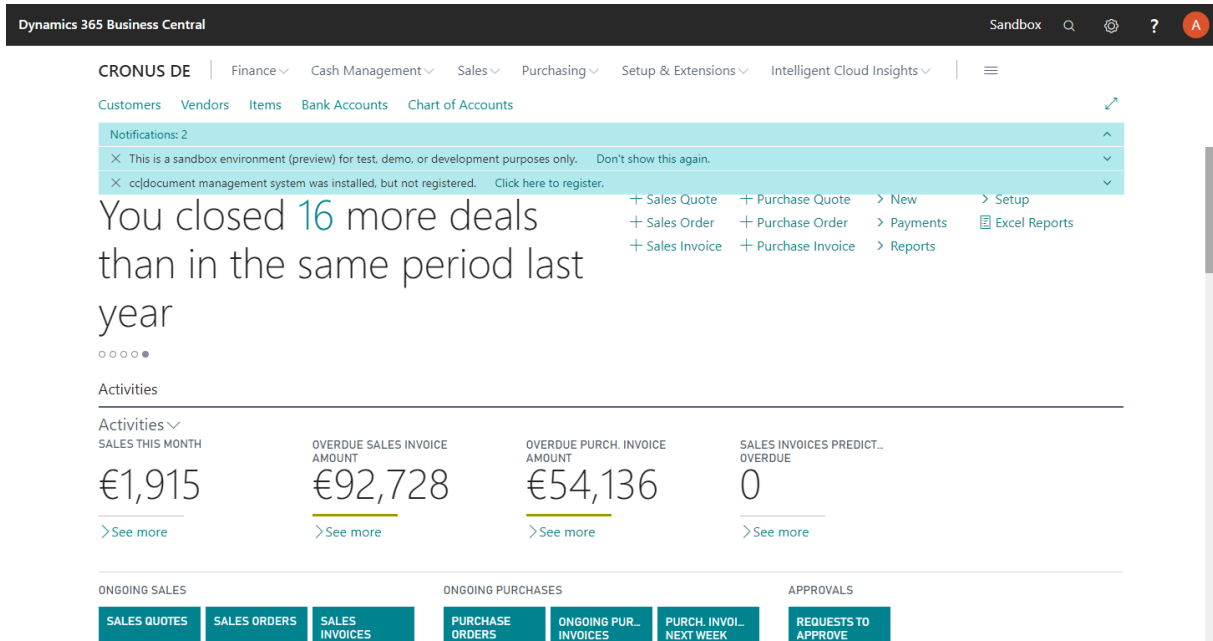
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## App Registration and Setup

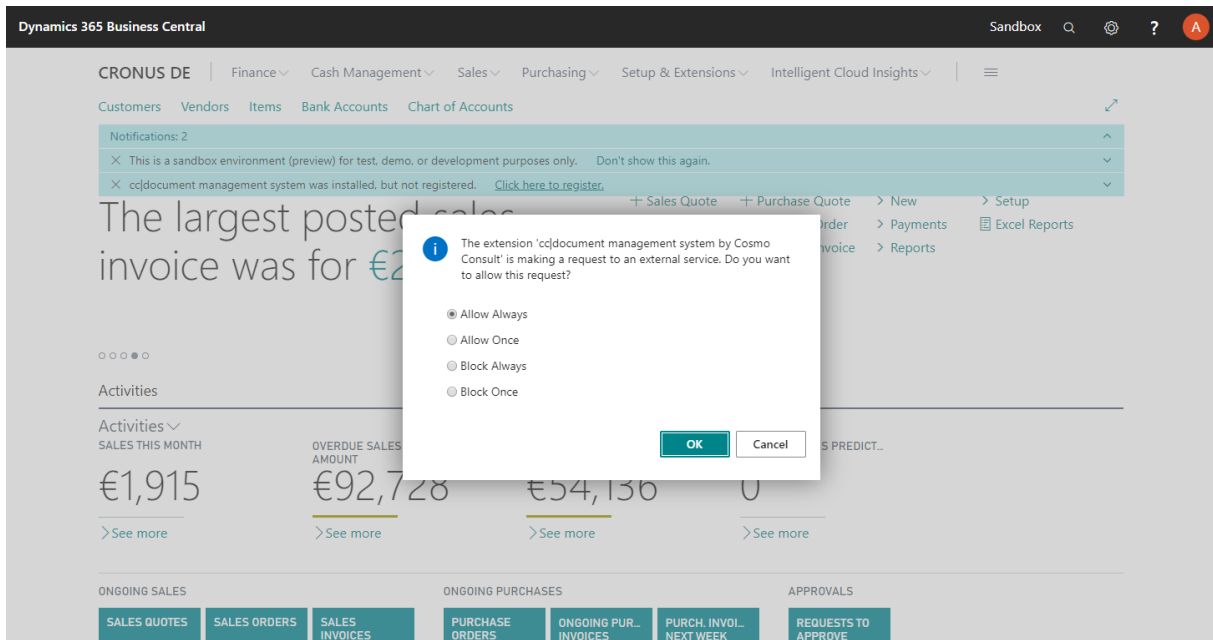
After publishing and installing the app, you need to register **cc|document management system**.

Start the App registration Wizard by choosing **Click here to register** in the notification bar.



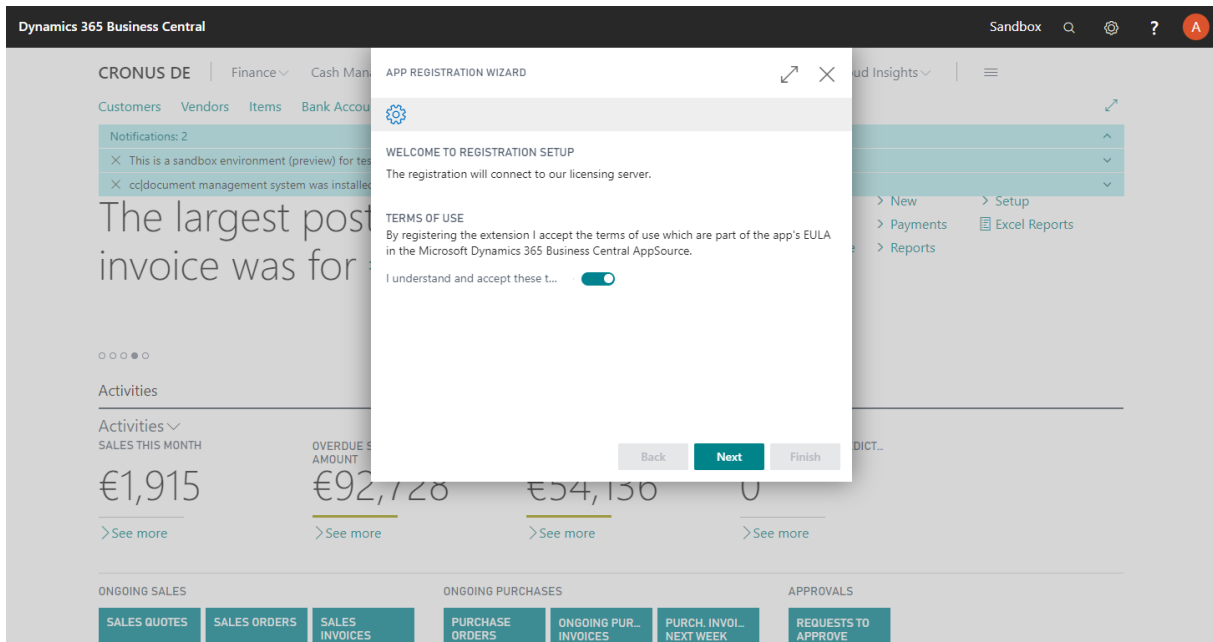
The screenshot shows the Dynamics 365 Business Central interface for 'CRONUS DE'. At the top, there is a navigation bar with 'Sandbox' and search icons. Below it, a notification bar contains two messages: 'This is a sandbox environment (preview) for test, demo, or development purposes only. Don't show this again.' and 'cc|document management system was installed, but not registered. Click here to register.' Below the notifications, a large card displays 'You closed 16 more deals than in the same period last year'. Underneath, there are four activity cards: 'SALES THIS MONTH' (€1,915), 'OVERDUE SALES INVOICE AMOUNT' (€92,728), 'OVERDUE PURCH. INVOICE AMOUNT' (€54,136), and 'SALES INVOICES PREDICT... OVERDUE' (0). At the bottom, there are three sections: 'ONGOING SALES' (Sales Quotes, Sales Orders, Sales Invoices), 'ONGOING PURCHASES' (Purchase Orders, Ongoing Pur... Invoices, Purch. Invol... Next Week), and 'APPROVALS' (Requests to Approve).

Select **Allow Always** to give **cc|document management system** permission to connect to the **COSMO CONSULT** app registration / licensing server. Choose **OK**.

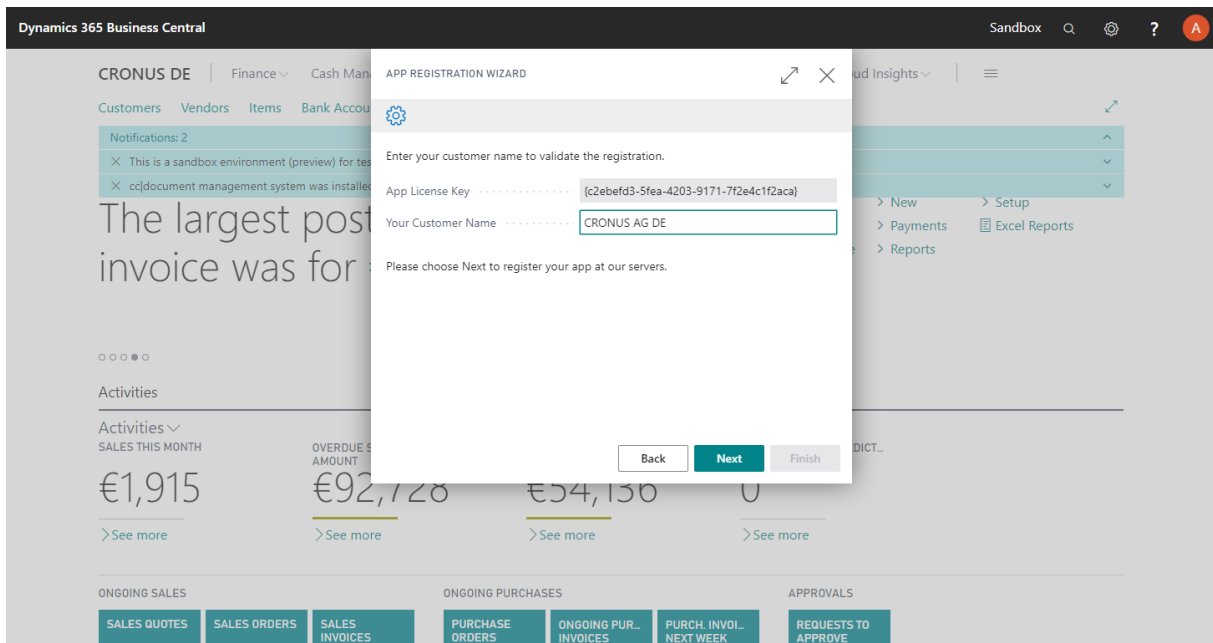


The screenshot shows the same Dynamics 365 Business Central interface as above, but with a permission dialog box overlaid. The dialog box has an information icon and contains the text: 'The extension 'cc|document management system' by Cosmo Consult is making a request to an external service. Do you want to allow this request?'. There are four radio button options: 'Allow Always' (selected), 'Allow Once', 'Block Always', and 'Block Once'. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

In order to agree to the Terms of Use, select **I understand and accept these terms** and choose **Next**.



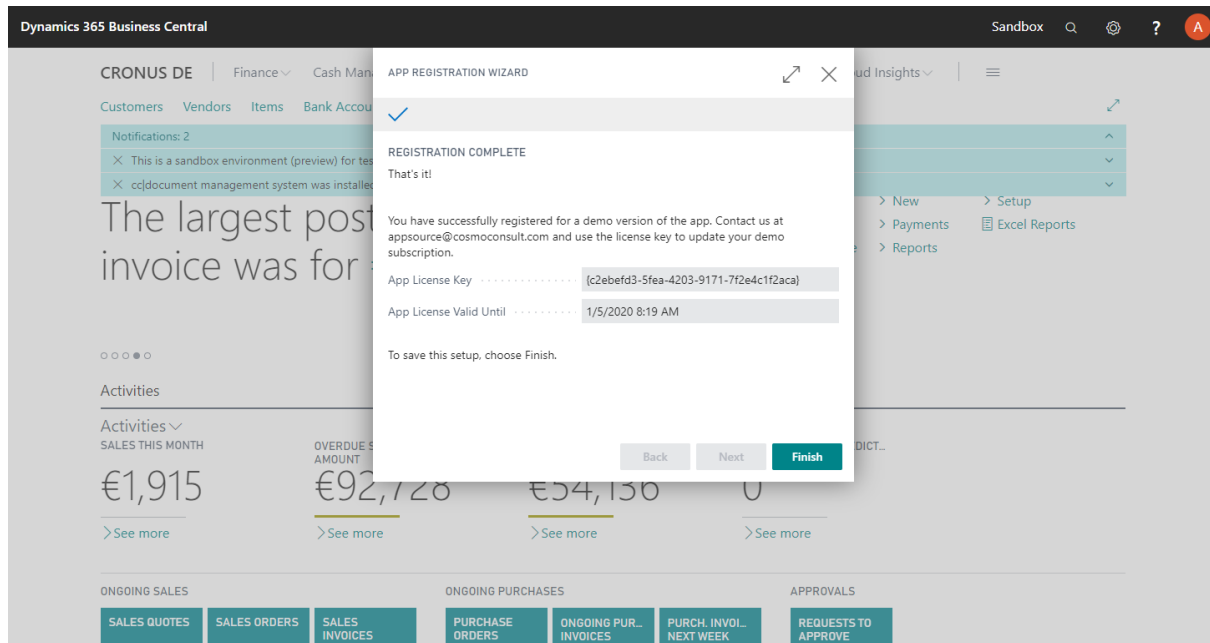
Enter your customer name. The name is used to identify the company. For test purposes, enter any Cronus related name. Choose **Next**.



**NOTE**

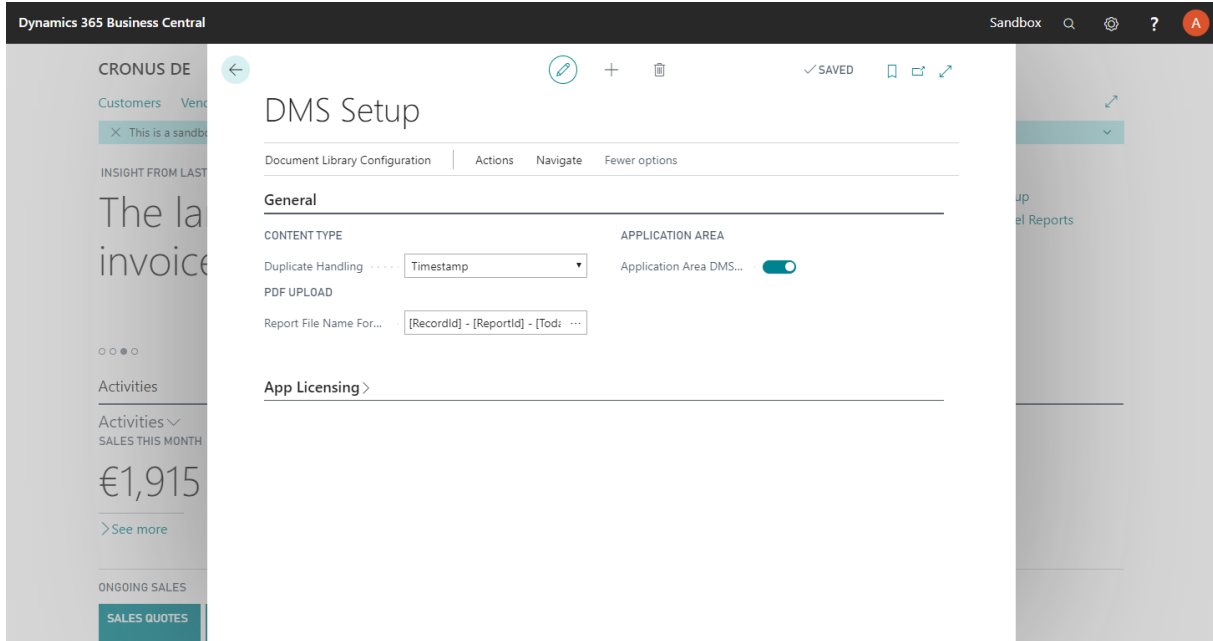
Your demo license will be valid for 30 days.

Choose **Finish** to close the wizard.

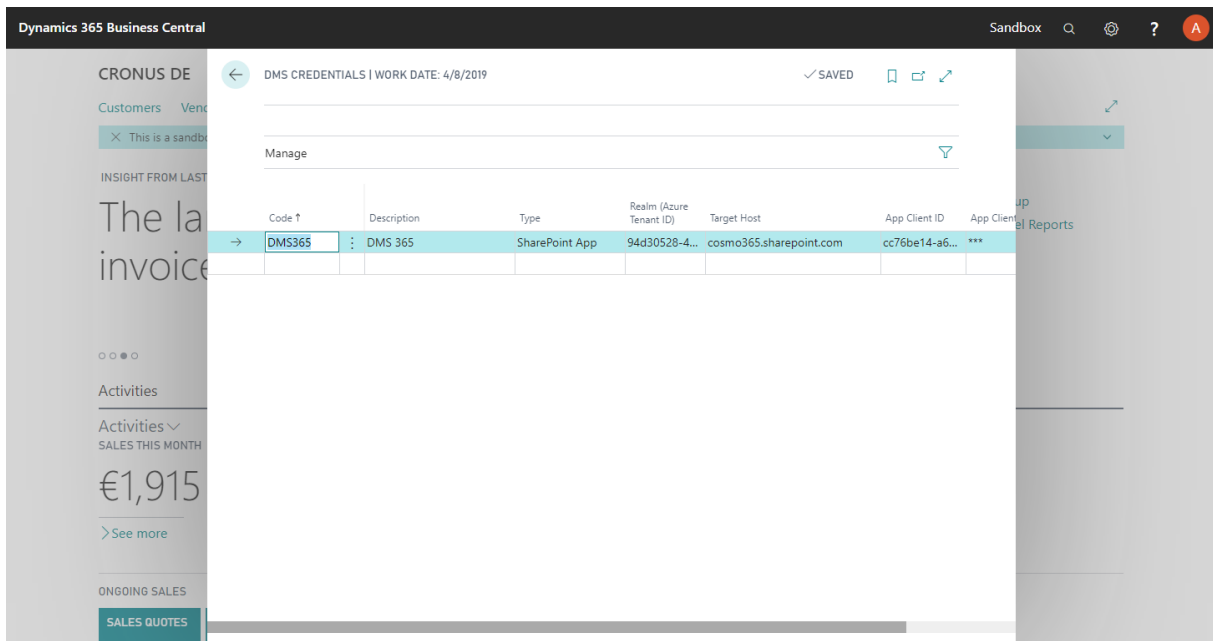


## Setup Configuration

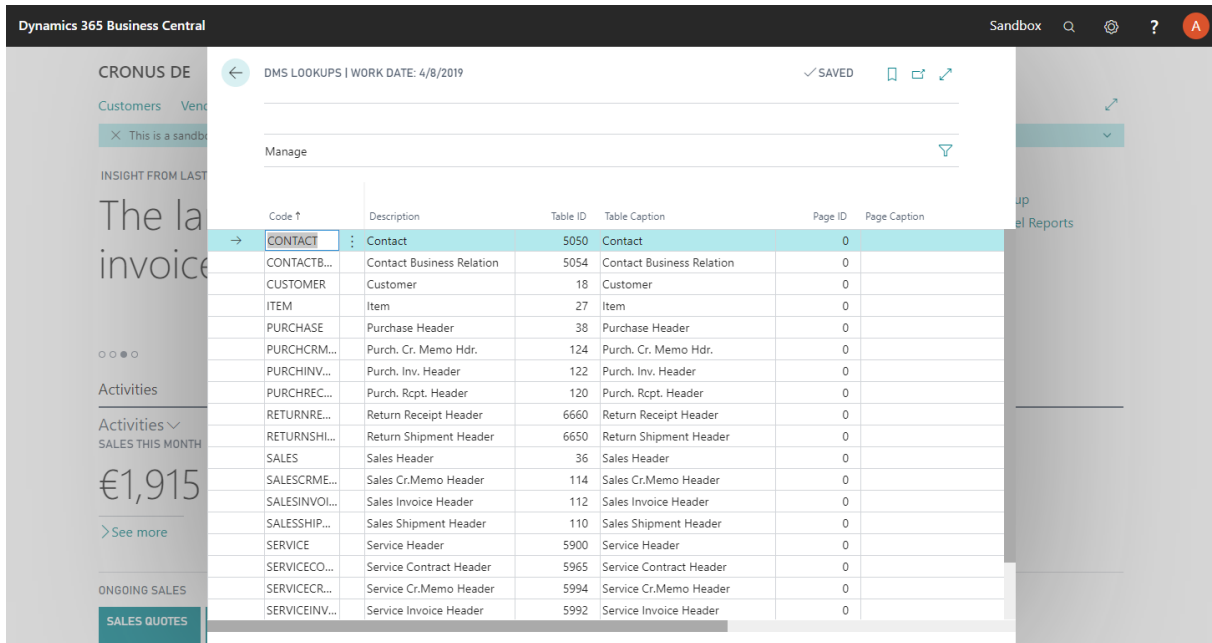
In Tell Me search box, enter **DMS Setup**, and then choose the related link. Configure the general settings for cc|document management system.



In Tell Me search box, enter **DMS Credentials**, and then choose the related link. Configure all SharePoint apps to connect and authorize for interactions with SharePoint sites.

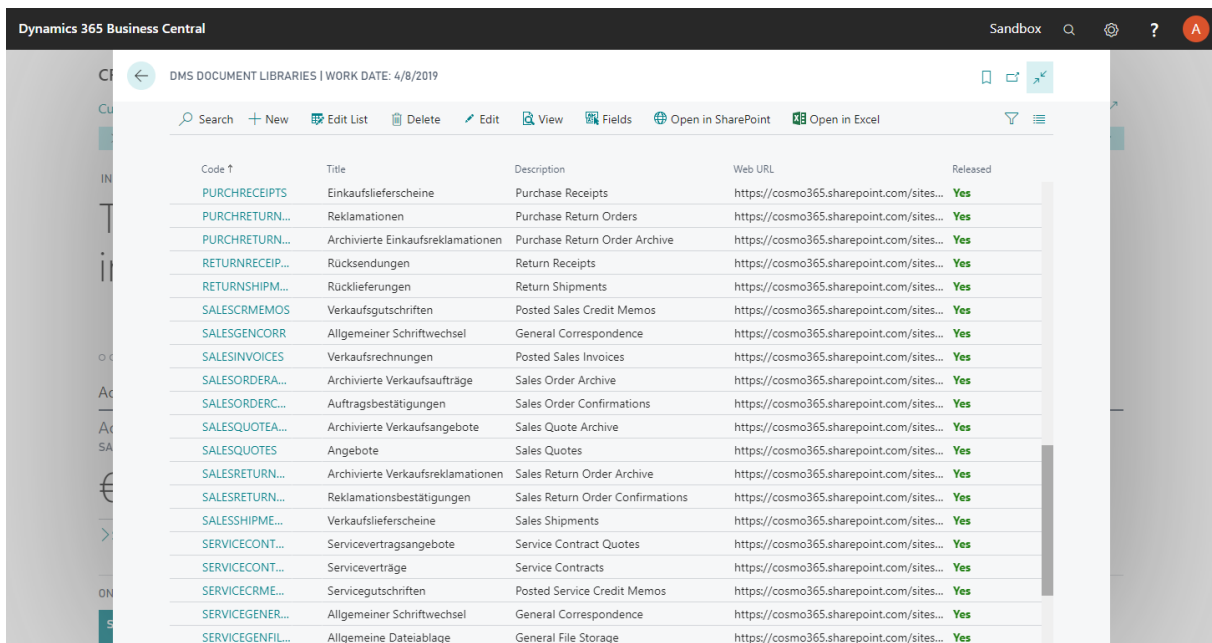


In Tell Me search box, enter **DMS Lookups**, and then choose the related link. Configure all lookups used by metadata configuration in the document libraries.



Code	Description	Table ID	Table Caption	Page ID	Page Caption
CONTACT	Contact	5050	Contact	0	
CONTACTB...	Contact Business Relation	5054	Contact Business Relation	0	
CUSTOMER	Customer	18	Customer	0	
ITEM	Item	27	Item	0	
PURCHASE	Purchase Header	38	Purchase Header	0	
PURCHCRM...	Purch. Cr. Memo Hdr.	124	Purch. Cr. Memo Hdr.	0	
PURCHINV...	Purch. Inv. Header	122	Purch. Inv. Header	0	
PURCHREC...	Purch. Rcpt. Header	120	Purch. Rcpt. Header	0	
RETURNRE...	Return Receipt Header	6660	Return Receipt Header	0	
RETURNSHL...	Return Shipment Header	6650	Return Shipment Header	0	
SALES	Sales Header	36	Sales Header	0	
SALESCRM...	Sales Cr.Memo Header	114	Sales Cr.Memo Header	0	
SALESINVO...	Sales Invoice Header	112	Sales Invoice Header	0	
SALESHIP...	Sales Shipment Header	110	Sales Shipment Header	0	
SERVICE	Service Header	5900	Service Header	0	
SERVICECO...	Service Contract Header	5965	Service Contract Header	0	
SERVICECR...	Service Cr.Memo Header	5994	Service Cr.Memo Header	0	
SERVICEINV...	Service Invoice Header	5992	Service Invoice Header	0	

In Tell Me search box, enter **DMS Document Libraries**, and then choose the related link. Configure all document libraries, content types, tables setups, SharePoint filter, record filter, metadata and lookup filter.



Code	Title	Description	Web URL	Released
PURCHRECEIPTS	Einkaufslieferscheine	Purchase Receipts	https://cosmo365.sharepoint.com/sites...	Yes
PURCHRETURN...	Reklamationen	Purchase Return Orders	https://cosmo365.sharepoint.com/sites...	Yes
PURCHRETURN...	Archivierte Einkaufsreklamationen	Purchase Return Order Archive	https://cosmo365.sharepoint.com/sites...	Yes
RETURNRECEIP...	Rücksendungen	Return Receipts	https://cosmo365.sharepoint.com/sites...	Yes
RETURNSHIPM...	Rücklieferungen	Return Shipments	https://cosmo365.sharepoint.com/sites...	Yes
SALESCRMEMOS	Verkaufsgutschriften	Posted Sales Credit Memos	https://cosmo365.sharepoint.com/sites...	Yes
SALESGENCORR	Allgemeiner Schriftwechsel	General Correspondence	https://cosmo365.sharepoint.com/sites...	Yes
SALESINVOICES	Verkaufsrechnungen	Posted Sales Invoices	https://cosmo365.sharepoint.com/sites...	Yes
SALESORDERA...	Archivierte Verkaufsaufträge	Sales Order Archive	https://cosmo365.sharepoint.com/sites...	Yes
SALESORDERC...	Auftragsbestätigungen	Sales Order Confirmations	https://cosmo365.sharepoint.com/sites...	Yes
SALESQUOTE...	Archivierte Verkaufsangebote	Sales Quote Archive	https://cosmo365.sharepoint.com/sites...	Yes
SALESQUOTES	Angebote	Sales Quotes	https://cosmo365.sharepoint.com/sites...	Yes
SALESRETURN...	Archivierte Verkaufsreklamationen	Sales Return Order Archive	https://cosmo365.sharepoint.com/sites...	Yes
SALESRETURN...	Reklamationsbestätigungen	Sales Return Order Confirmations	https://cosmo365.sharepoint.com/sites...	Yes
SALESHIPME...	Verkaufslieferscheine	Sales Shipments	https://cosmo365.sharepoint.com/sites...	Yes
SERVICECONT...	Servicevertragsangebote	Service Contract Quotes	https://cosmo365.sharepoint.com/sites...	Yes
SERVICECONT...	Serviceverträge	Service Contracts	https://cosmo365.sharepoint.com/sites...	Yes
SERVICECRME...	Servicegutschriften	Posted Service Credit Memos	https://cosmo365.sharepoint.com/sites...	Yes
SERVICEGENER...	Allgemeiner Schriftwechsel	General Correspondence	https://cosmo365.sharepoint.com/sites...	Yes
SERVICEGENFIL...	Allgemeine Dateiablage	General File Storage	https://cosmo365.sharepoint.com/sites...	Yes

In Tell Me search box, enter **Report Selection**, and then choose the related link. Configure the Document Library Code and Content Type Code for implemented documents for Sales, Purchase and Service of Microsoft Dynamics 365 Business Central base application.

