



**Business-  
Software  
for People**

**cc | document management system**

# DOCUMENT MANAGEMENT

AUTOMATIC DOCUMENT ARCHIVING

STORAGE OF DOCUMENTS BY DRAG & DROP

UNIFORM DOCUMENT STORAGE

ALL DOCUMENTS ABOUT A PROCESS AT A GLANCE

E-MAILVERSAND VON DOKUMENTEN

DOCUMENT MANAGEMENT WITH SHAREPOINT

DOCUMENT BOX IN MICROSOFT DYNAMICS 365 BUSINESS CENTRAL

WEB BASED ACCESS

**Microsoft  
Partner**



Gold Enterprise Resource Planning  
Gold Cloud Customer Relationship Management  
Gold Collaboration and Content  
Gold Data Analytics  
Gold Cloud Platform

## INTEGRATED DOCUMENT MANAGEMENT VIA MICROSOFT DYNAMICS 365 BUSINESS CENTRAL BASED ON MICROSOFT SHAREPOINT

cc|document management system (cc|dms) facilitates easy and intuitive document management in Microsoft Dynamics 365 Business Central (Business Central). Any documents relating to a particular data record in Business Central can be filed in Microsoft SharePoint (SharePoint) and displayed in SharePoint and Business Central. It is possible to interact with the documents directly via the Business Central interface and the associated functions can be used without restrictions in Microsoft SharePoint. In other words, users can process documents without leaving Dynamics.

## CC|DMS – THE ADVANTAGES AT A GLANCE

- ▶ Fast retrieval of process-relevant documents thanks to data set-related integration into the Business Central user interface
- ▶ Easy to use because of uniform document storage, indexing and research of documents
- ▶ Automatic document archiving ensures secure filing
- ▶ Access to documents for non-ERP users through integration into existing SharePoint installations
- ▶ SharePoint standard features reduce the effort for configuration and setup in Microsoft Dynamics 365 Business Central
- ▶ Mobile, web-based, cross-location access to all content

DMS Document Box

The screenshot displays the Dynamics 365 Business Central interface for a sales invoice (No. 103034) for 'Möbel-Meller KG'. The 'Document Box' is open on the right, showing a list of document types and their counts. A red box highlights the 'Sales Shipments' section, and a red arrow points to a specific document: 'Sales Shipment Header 102045 - 0 - 2019-12-04 171137.315.pdf'.

Type	No.	Description	Quantity	Unit of Measure Code	Unit Price Excl. VAT	Line Discount %	Line Amount Excl. VAT
Item	1001	Rennrad	1	STÜCK	4.000,00		4.000,00

Invoice Details	
Invoice Discount Amount Excl. V...	0.00
Total VAT (EUR)	760.00
Total Excl. VAT (EUR)	4.000.00
Total Incl. VAT (EUR)	4.760.00

Integrated document management

## THE DOCUMENT BOX IN MICROSOFT DYNAMICS 365 BUSINESS CENTRAL

The document box serves as a central filing location for documents in Business Central. In the familiar Microsoft Dynamics 365 environment, you can insert documents and receipts quickly and easily via drag & drop.

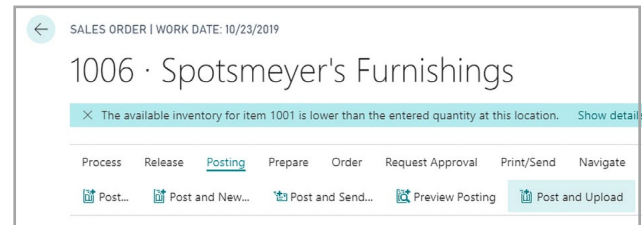
Depending on how the filing structure is configured in Microsoft SharePoint, new documents are automatically assigned keywords and metadata when uploaded via Dynamics 365 Business Central. They are then stored in Microsoft SharePoint document libraries. In addition, the Business Central client provides numerous functions for document management, such as

- ▶ Upload, open and delete files
- ▶ View and edit the metadata for a particular document
- ▶ View the SharePoint document library and filter documents
- ▶ Copy a link to a document
- ▶ Search and
- ▶ Manage history and version.

## AUTOMATIC DOCUMENT ARCHIVING

Thanks to the additional „Post and Upload PDF“ function, documents generated in Microsoft Dynamics 365 Business Central are automatically converted to

PDF format and archived Microsoft SharePoint. Indexing with the relevant metadata is also an automated process, too.

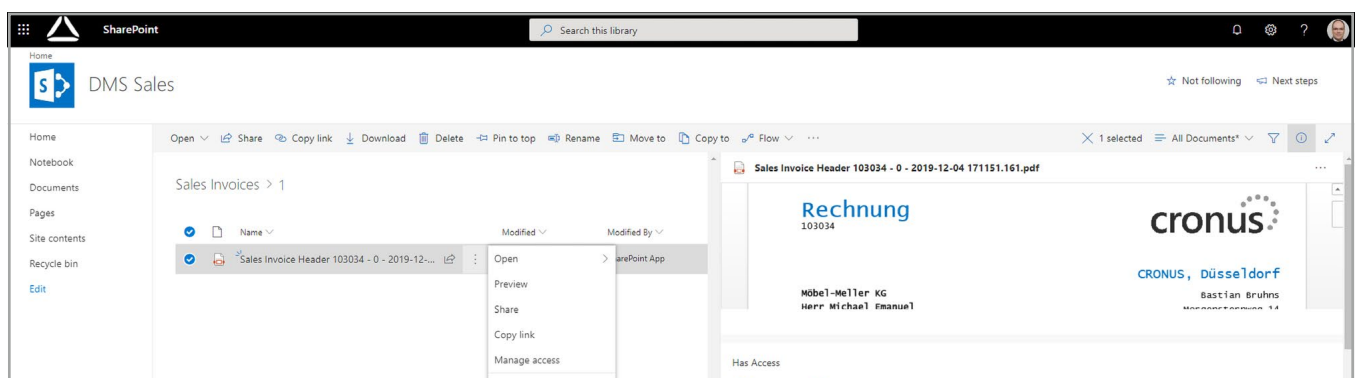


Additional functions "Post and Upload PDF"

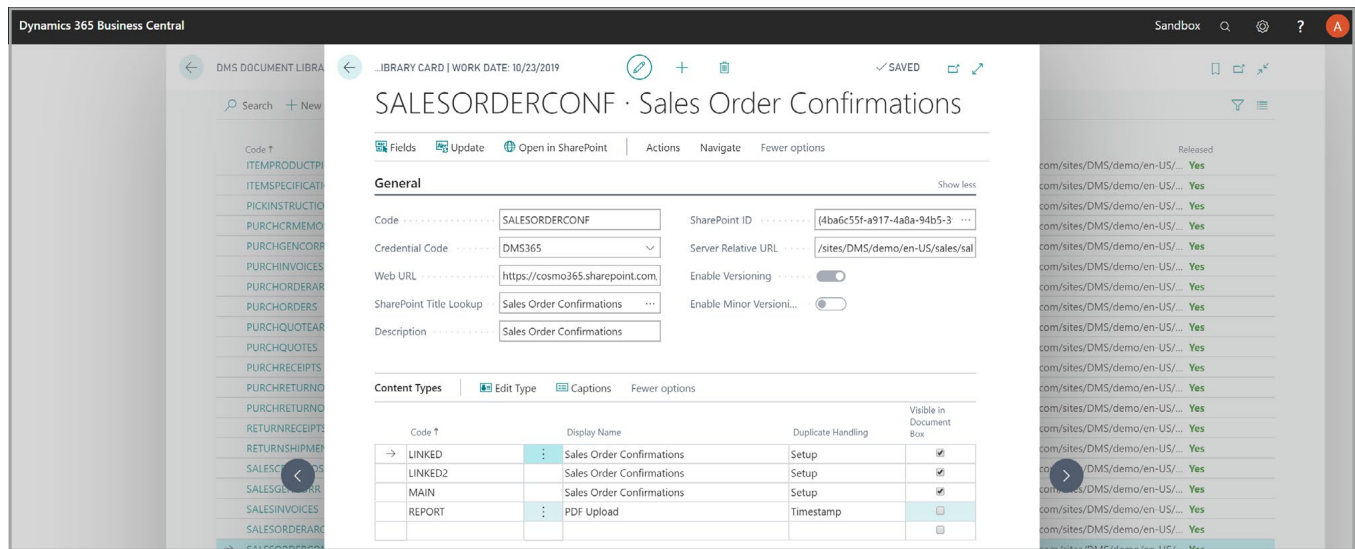
## DOCUMENT MANAGEMENT IN MICROSOFT SHAREPOINT

Microsoft SharePoint offers basic functions for managing documents. Documents generated or archived via Microsoft Dynamics 365 Business Central can also be edited directly in SharePoint. The following functions are available (depending on user permissions):

- ▶ Save and edit documents
- ▶ Manage meta data
- ▶ Manage the version of a document
- ▶ Filter, group and sort lists and document libraries
- ▶ Automatically notify users of changes to libraries and documents
- ▶ Search SharePoint
- ▶ Configure views
- ▶ Integrate with Microsoft Outlook
- ▶ Design workflows for document analysis and approvals
- ▶ Assign user access privileges



Document management in SharePoint



Library Set (Extract)

## STANDARDISED FILING STRUCTURE IN SHAREPOINT WITH LIBRARY SET

The library set represents a best practice filing structure in Microsoft SharePoint based on typical processes in Microsoft Dynamics 365 Business Central. The library set includes

- ▶ Document libraries for areas such as customers, vendors, articles, purchasing or sales
- ▶ Defined document libraries, document and content types as well as
- ▶ Meta data.

Individual adjustments to the filing structure are possible at any time.

## THE BENEFITS OF THE LIBRARY SET AT A GLANCE

- ▶ Immediately available filing structure for Microsoft Dynamics 365 Business Central sections (employees, products, purchasing, sales, service)
- ▶ Quick introduction of cc|dms
- ▶ Thanks to the SharePoint template, which is based on best practice experience, an analysis of the actual and target structure is not mandatory

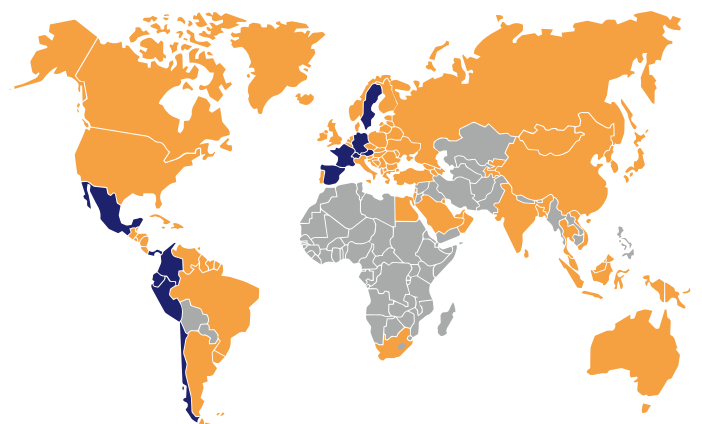
## THE POTENTIAL OF CC|DMS

Microsoft SharePoint is the ideal platform for supporting communication and collaboration in your company. SharePoint a wealth of functionality for creating, organizing, managing or sharing documents and information, and allows communication among teams and within the company to be more transparent and efficient. Based on this functionality, you can provide

- ▶ Company-specific solutions for document and contract management
- ▶ Team and project portals
- ▶ Digital workspaces and
- ▶ Workflows for approval and release processes (e.g. vacation requests, release of project times).

In addition, apps and solutions designed by third parties can be used to extend the functionality.





Berlin | Bielefeld | Bremen | Cologne | Dresden | Hamburg | Leipzig | Magdeburg  
Muenster | Munich | Neumarkt in der Oberpfalz | Nuremberg | Stuttgart | Wuerzburg  
AUSTRIA | FRANCE | SPAIN | SWEDEN | SWITZERLAND  
CHILE | COLUMBIA | ECUADOR | MEXICO | PANAMA | PERU