CC|DOCUMENT MANAGEMENT SYSTEM

Registration and Setup

App Version: 2.1.3429.0 | Date: 01.04.2020

COSMO CONSULT GmbH

Schöneberger Straße 15

10963 Berlin

Web: www.cosmoconsult.com

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1 App Registration

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.
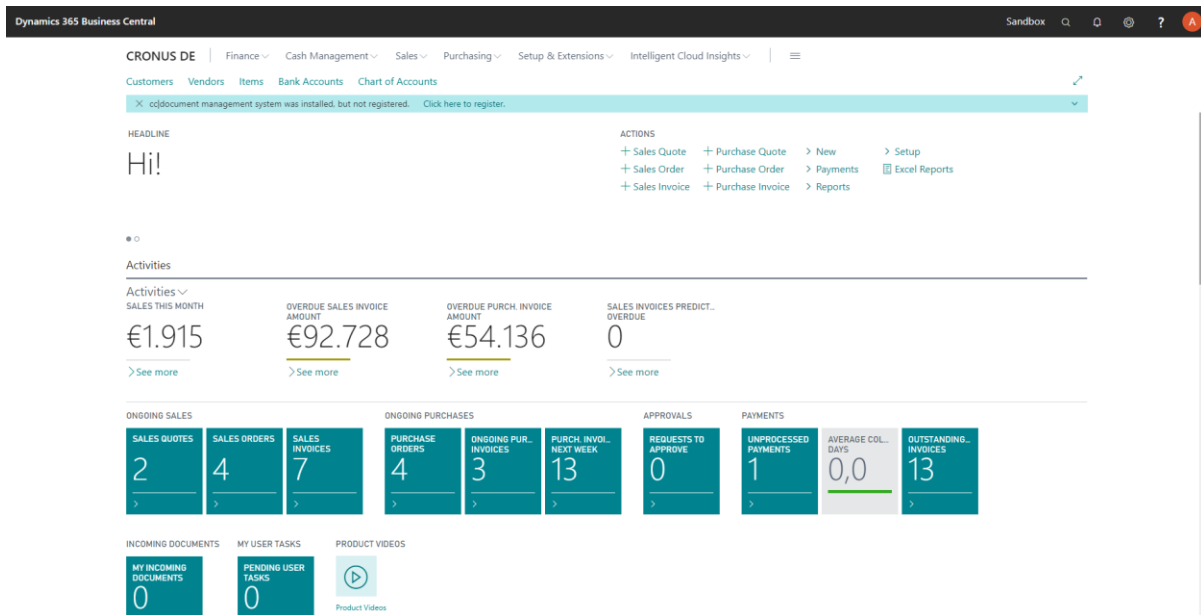

Figure 1: Notification shown when first start Business Central.

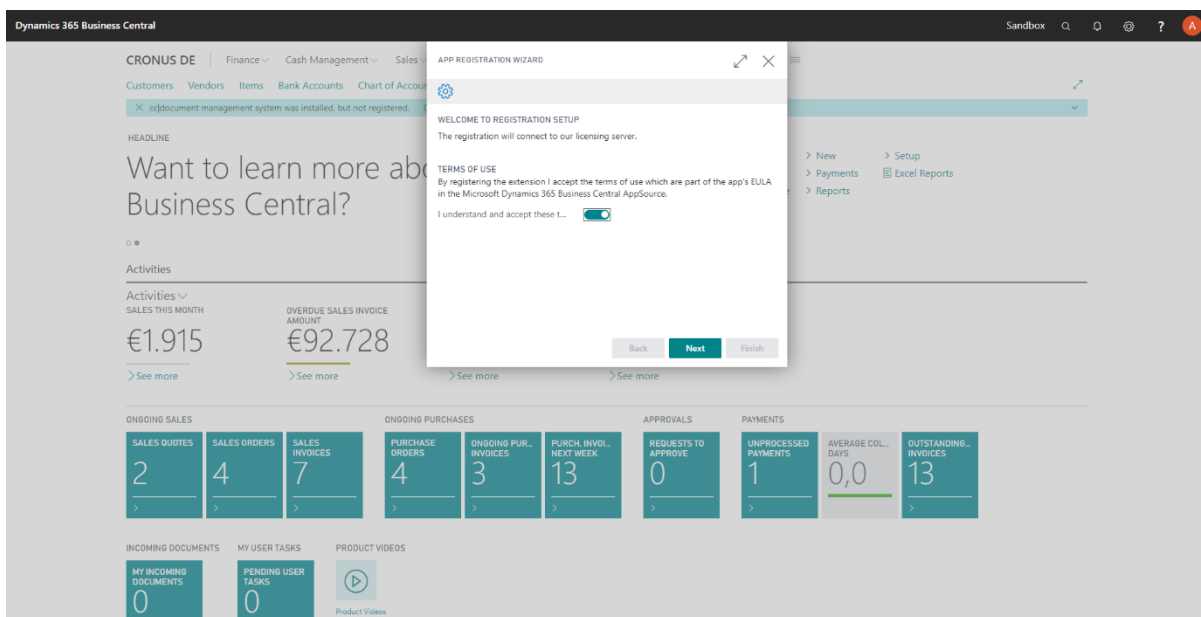In order to agree to the Terms of Use, select I understand and accept these terms and choose Next.

Figure 2: App Registration Wizard welcome page.

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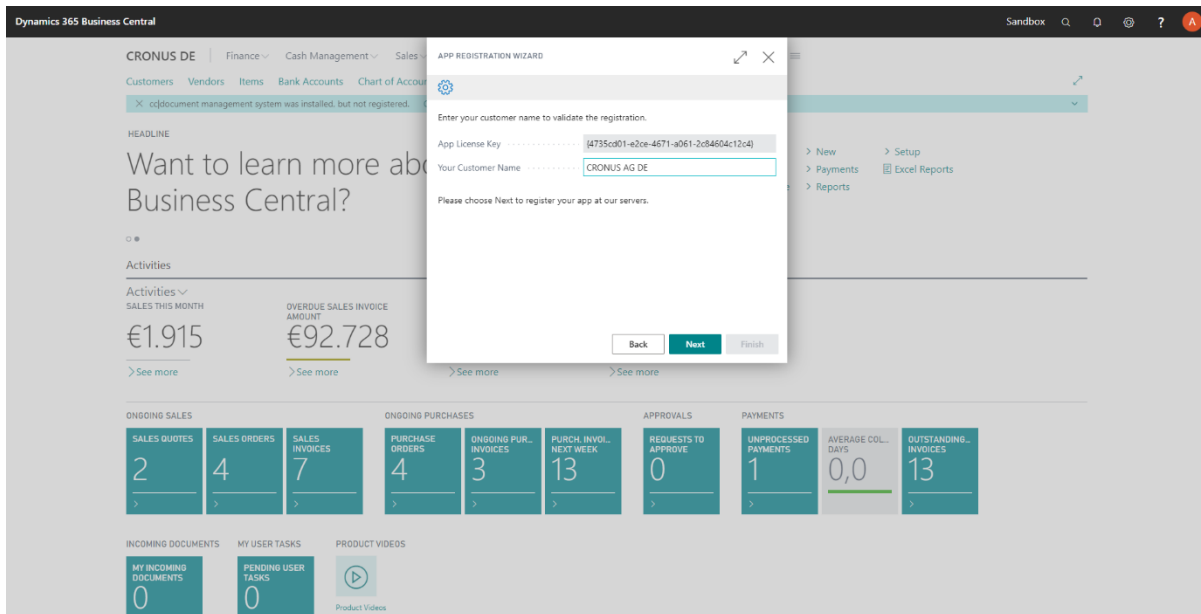
NOTE

Your demo license will be valid for 30 days.

Figure 3: App Registration Wizard input request page.

Choose Finish to close the wizard. The app registration is now finished.
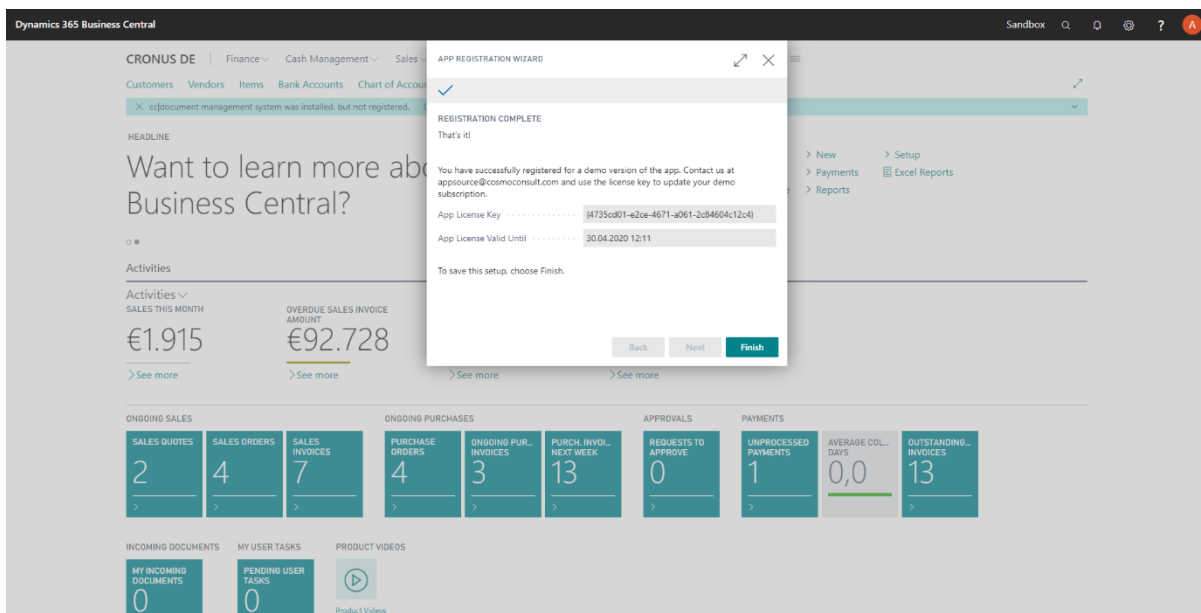

Figure 4: App Registration Wizard finish page.

2 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.
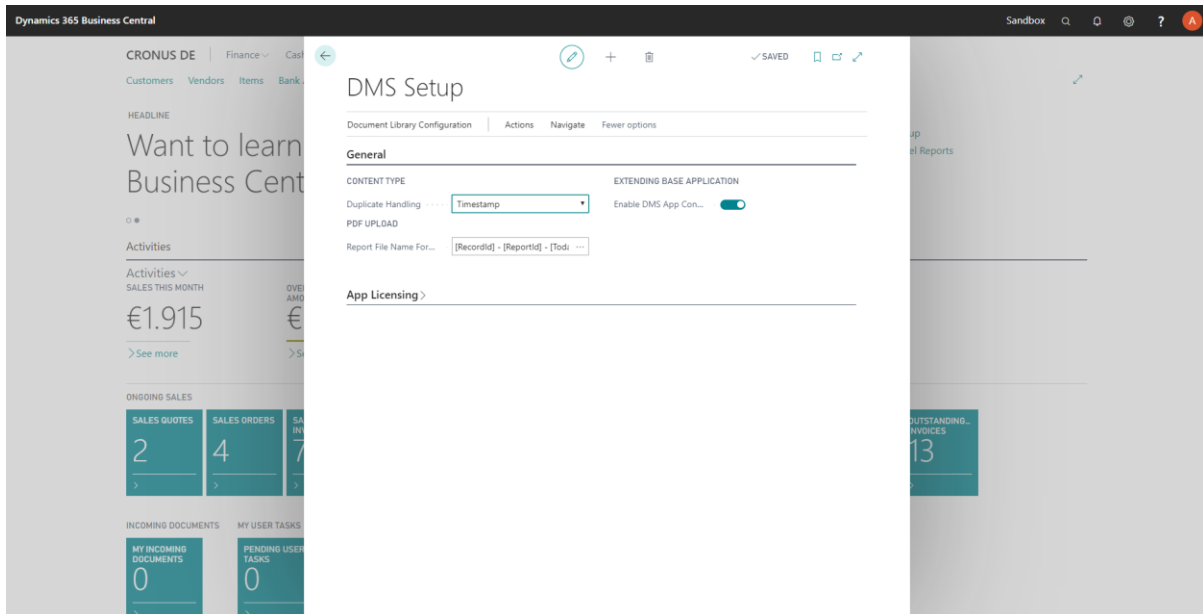

Figure 5: DMS Setup Card

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.
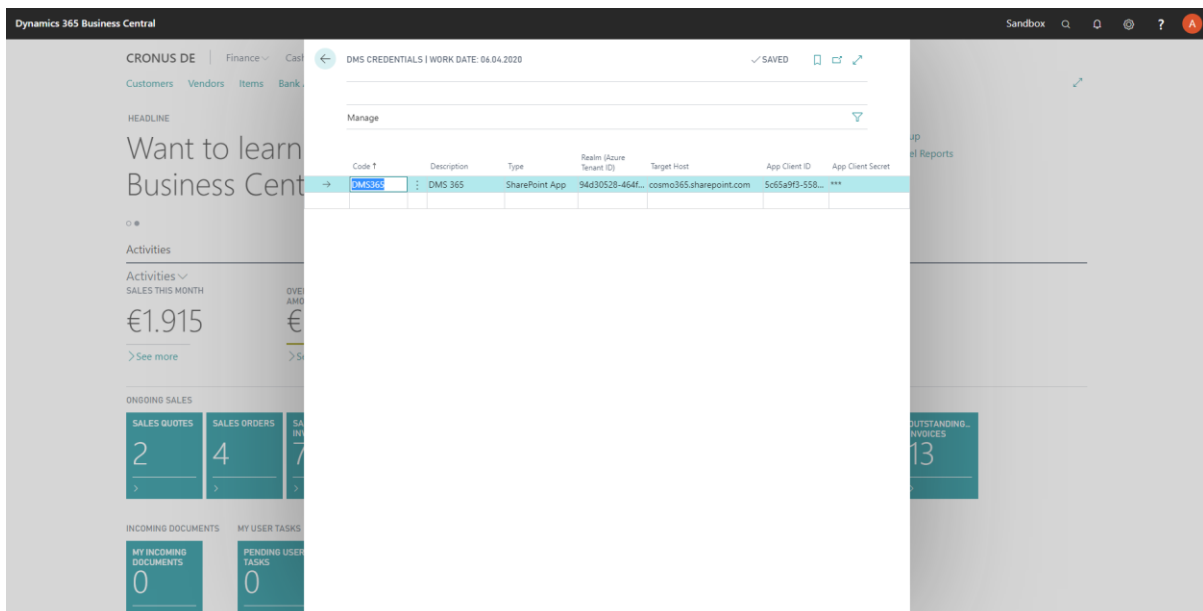

Figure 6: DMS Credentials Card

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.
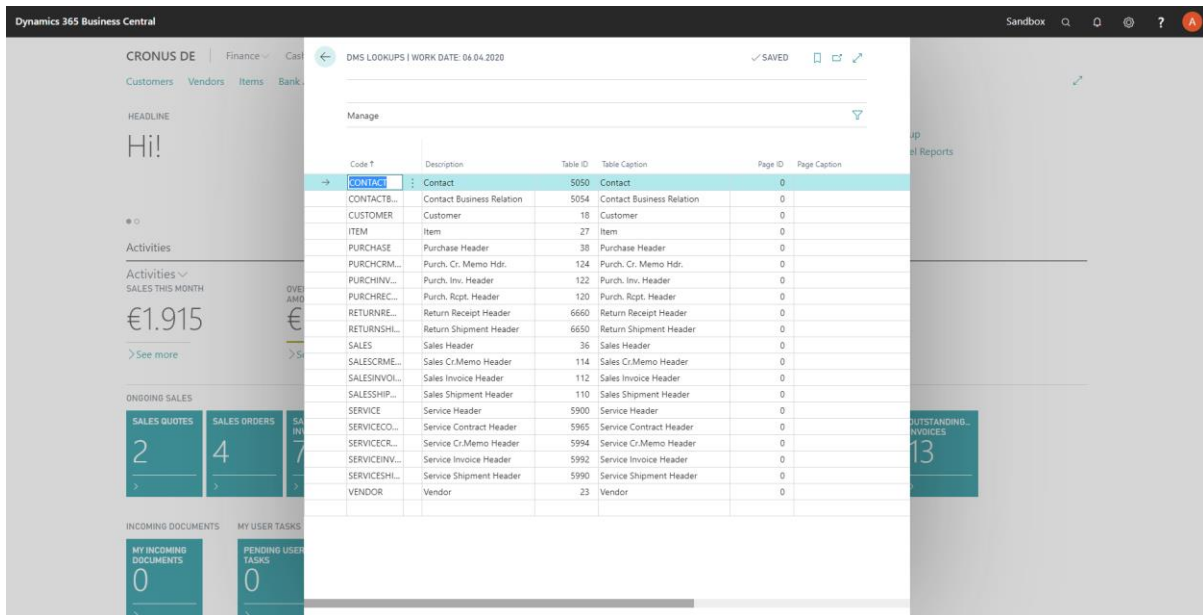

Figure 7: List of DMS Lookups

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.
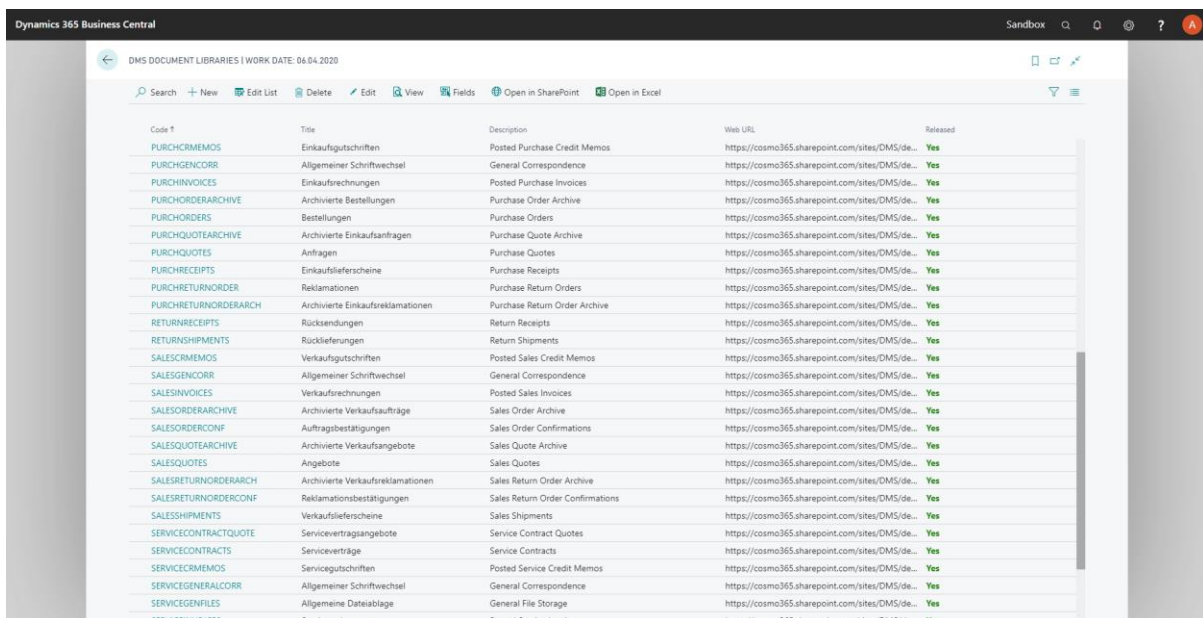

Figure 8: List of DMS Document Libraries

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.
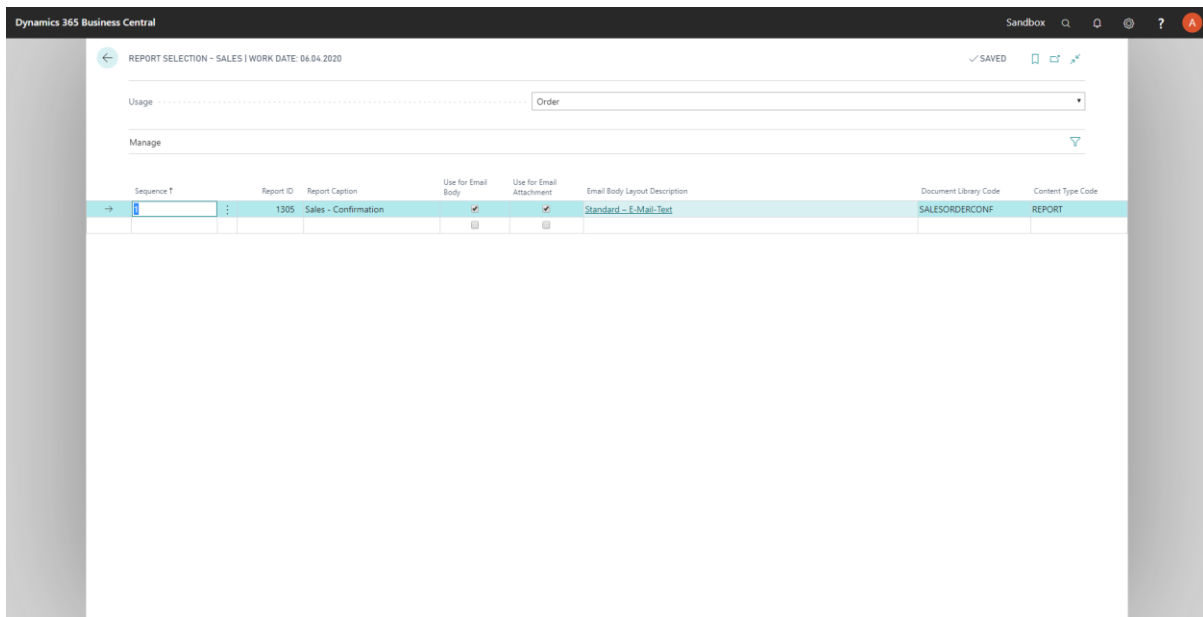

Figure 9: Report Selection - Sales card

Appendix

This documentation is based on the program versions/configurations listed in the following table.

Program Version/Configuration	Technical Version / Configuration Name
Microsoft Dynamics 365 Business Central 15.00	BC 15.4.41023.41932
cc|document management system	2.1.3429.0