



COSMO CONSULT
Business-Software for People



FACTS

COSMO Document Management System

COSMO Document Management System

based on Microsoft Dynamics 365
Business Central

DMS IN MICROSOFT DYNAMICS 365 BUSINESS CENTRAL

COSMO Document Management System facilitates easy and intuitive document management in Microsoft Dynamics 365 Business Central. Any documents relating to a particular data record in Dynamics 365 Business Central can be filed in Microsoft SharePoint (SharePoint) and displayed in SharePoint and Dynamics 365 Business

Central. It is possible to interact with the documents directly via the Dynamics 365 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 365.

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 Dynamics 365 Business Central
- ▶ Mobile, web-based, cross-location access to all content

The screenshot displays the Dynamics 365 Business Central interface. The main window shows a 'POSTED SALES INVOICE' for '103034 · Möbel-Meller KG' with a work date of 10/23/2019. The invoice details include a customer 'Möbel-Meller KG', contact 'Herr Michael Emanuel', and a due date of 11/23/2019. The invoice lines table shows one item: 'Rennrad' (Bicycle) with a quantity of 1, unit price of 4,000.00, and a line amount of 4,000.00. The invoice totals are: Total VAT (EUR) 760.00, Total Excl. VAT (EUR) 4,000.00, and Total Incl. VAT (EUR) 4,760.00. The invoice details section shows a currency code, shipment date of 10/23/2019, payment terms code '1M(8T)', and a payment discount of 2. On the right side, there is a 'Document Box' panel. It contains a list of documents categorized by type: General Correspondence(0), Posted Sales Invoices(1), Sales Order Confirmations(1), Sales Quotes(0), Sales Shipments(1), Customer Purchase Orders(0), Customer Purchase Quotes(0), Posted Service Invoices(0), and Sales Order Confirmations(1). A red box highlights the 'Posted Sales Invoices(1)' category, and a red arrow points to the 'Sales Invoice Header 103034 - 0 - 2019-12-04 171151.161.pdf' document. Below this, another red box highlights the 'Sales Order Confirmations(1)' category, and a red arrow points to the 'Sales Header 1,1007 - 0 - 2019-12-04 171137.315.pdf' document.

Integrated document management

DMS Document Box

THE DOCUMENT BOX IN 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.

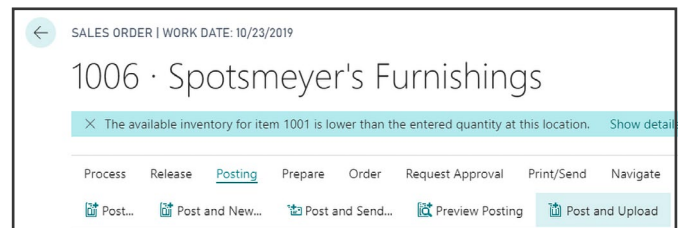
Depending on how the filing structure is configured in Microsoft SharePoint, new documents are automatically assigned keywords and metadata when uploaded via Dynamics 365 Business Central. They are then stored in Microsoft SharePoint document libraries. In addition,

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 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 WITH MICROSOFT SHAREPOINT

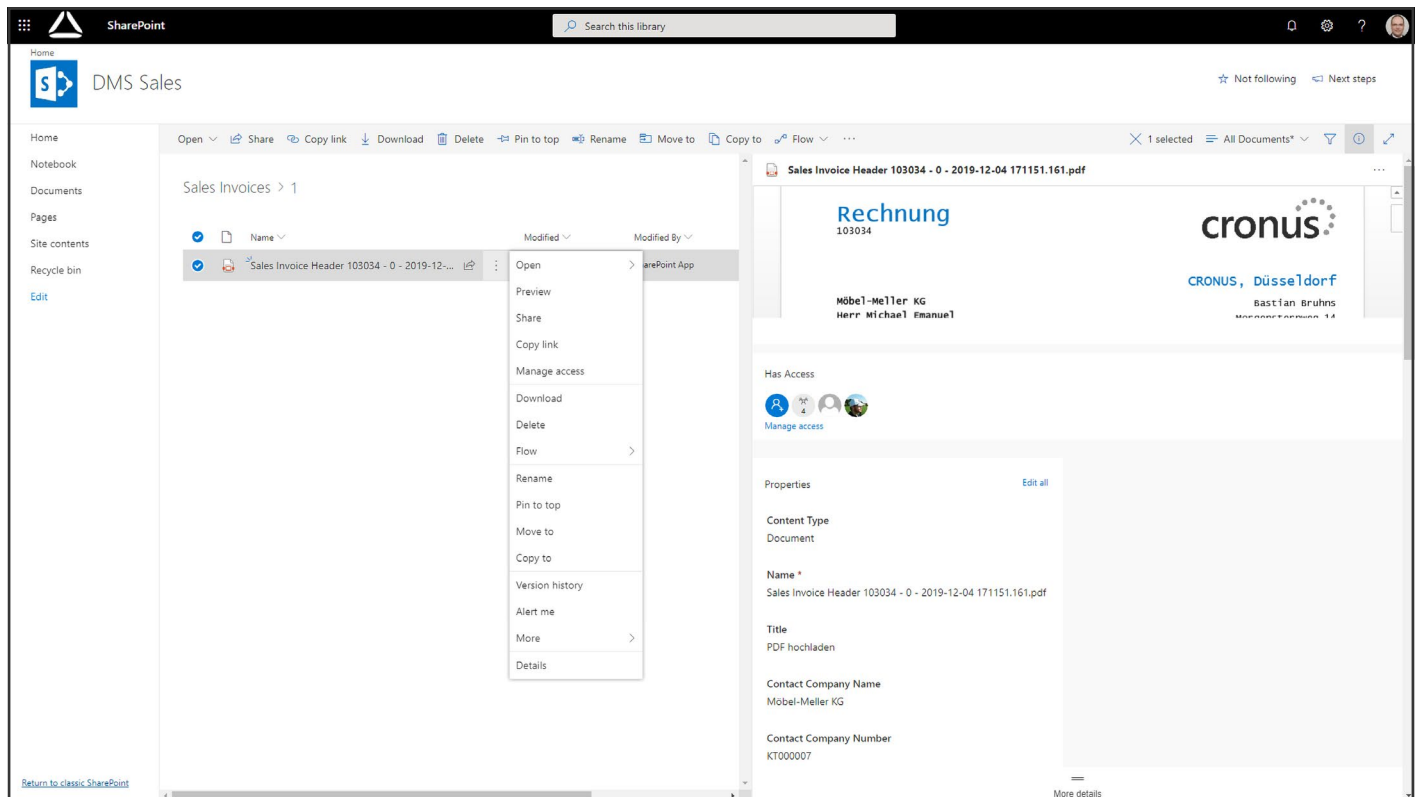
Microsoft SharePoint offers basic functions for managing documents. Documents generated or archived via Dynamics 365 Business Central can also be edited directly in SharePoint. The following functions are available (depending on user permissions):

- ▶ 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



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Document management in SharePoint

THE POTENTIAL OF COSMO DOCUMENT MANAGEMENT SYSTEM

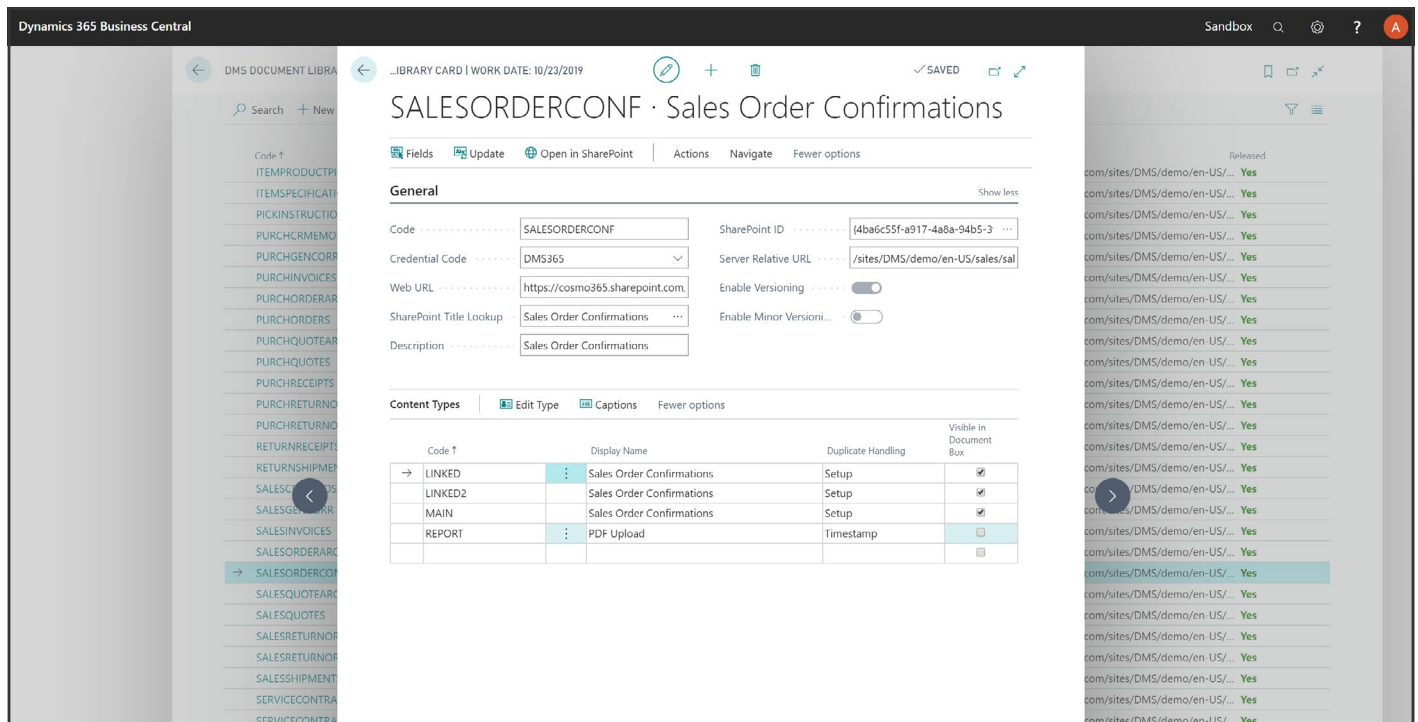
Microsoft SharePoint is the ideal platform for supporting communication and collaboration in your company. SharePoint a wealth of functionality for creating, organizing, managing or sharing documents and information, and allows communication among teams and within the company to be more transparent and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

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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 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.

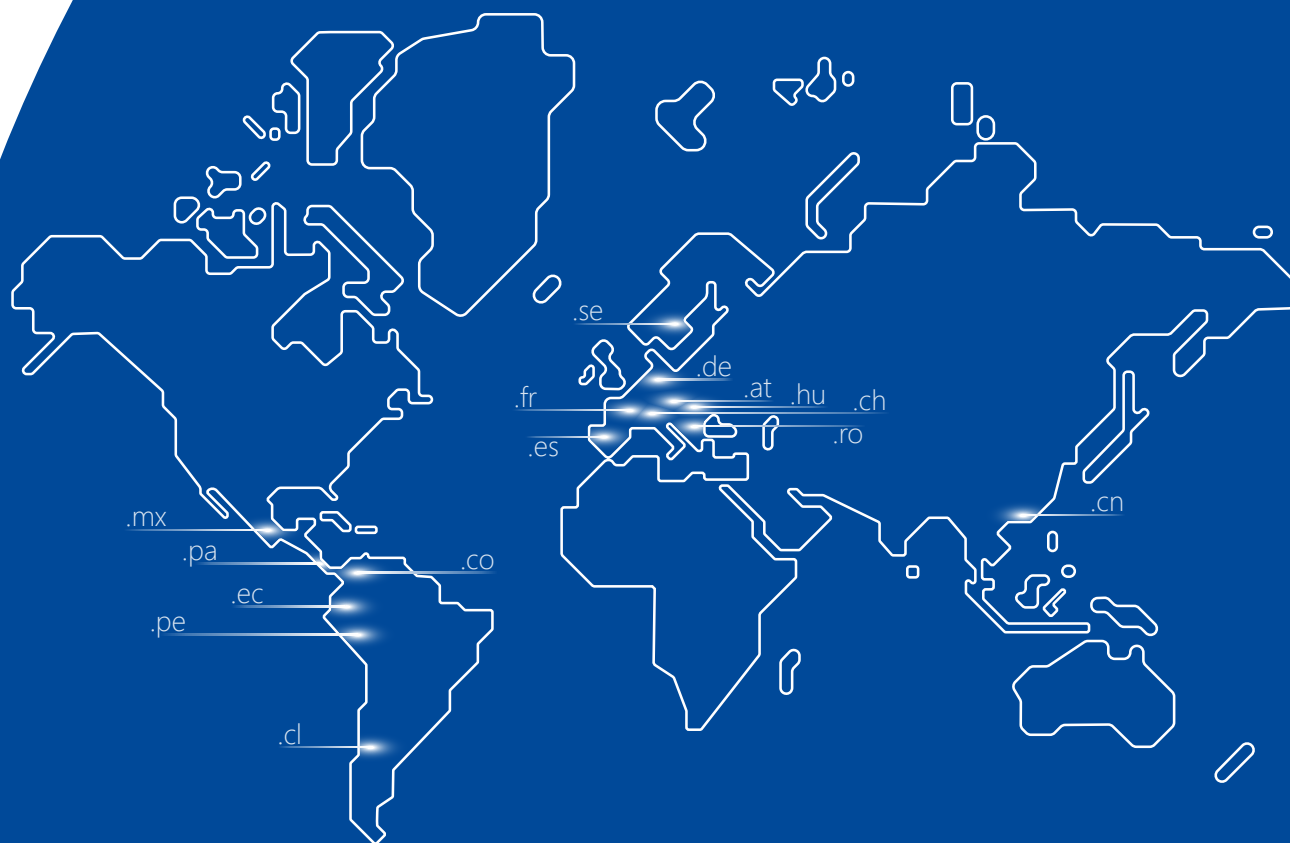
THE BENEFITS OF THE LIBRARY SET AT A GLANCE

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

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