



DMS interface to DocuWare/JobRouter and Microsoft Dynamics 365 Business Central

If you already use Microsoft Dynamics 365 Business Central in your company, you know the advantages of an ERP system. A document management system, combined with our interface to Business Central, will help you get more out of the system and its features and make your daily work easier.

Through our interface between Business Central and DocuWare/JobRouter, you can access your file cabinet from any desired location in Business Central and process all the information and documents stored there without leaving your familiar working environment.

Legally compliant storage

The interface can automatically transfer all documents (reports) generated in Business Central to the DMS archive. Thus, the legally required archiving obligation is automatically and reliably fulfilled and incoming documents are stored in the archive in a legally and audit-proof manner. Manual filing is no longer necessary, which saves time and money.

Linking of processes and documents

Processes and documents can be linked in different ways. For documents received in paper form, the interface can generate a barcode that is applied to the document. Using this barcode, the Business Central interface automatically assigns the document to a particular process during subsequent scanning and provides this document with the corresponding keywords. In addition, e-mails and other electronic documents can be conveniently dragged & drop onto the process in Business Central. The file or e-mail is thus stored in the archive and simultaneously linked to the process. When a booking is

transferred from the DMS to Business Central, there is also the option of automatic linking. The archived document is automatically assigned to the transaction in Business Central.

Document display and research

Business Central users have direct access to all documents stored in the archive, provided they have the appropriate authorization. The document search function can be integrated into all Business Central screens. The keywords used during archiving provide the search criteria that can be used for a targeted overview of all documents relevant to the transaction. The functions of the interface optimize the existing workflow of the users, are self-explanatory and intuitive to use. The efficiency of the search via the interface ensures time savings and satisfaction.

Data synchronization DMS and Business Central

With early archiving, invoices are scanned, indexed and archived in the DMS immediately after receipt. In order that the accountant does not have to re-enter the data manually, invoice data can be transferred to Business Central via automatic booking transfer.

Of course, the data exchange works the other way round as well. Data can also be transferred from Business Central to DocuWare. For example, posting documents can be automatically stamped with a „posted stamp“ in DocuWare when they are posted. In addition, OPOS can be „monitored“ by the system. This makes it possible to automatically stamp the corresponding invoice with „paid“ when clearing. This way, your documents always correspond to the current status and

the status is transparent for all parties involved.

Application scenarios

With Business Central in combination with a DMS all correspondence is automatically archived from the system without being changed when it is sent, so you can trace every process seamlessly and react to customers enquiries confidently. Furthermore you archive all documents legally compliant. So with Business Central there is no longer the risk of not fulfilling the legal storage obligations.

In addition you can process incoming invoices faster in the future. With DocuWare and Business Central the current status is transparent for all parties involved.

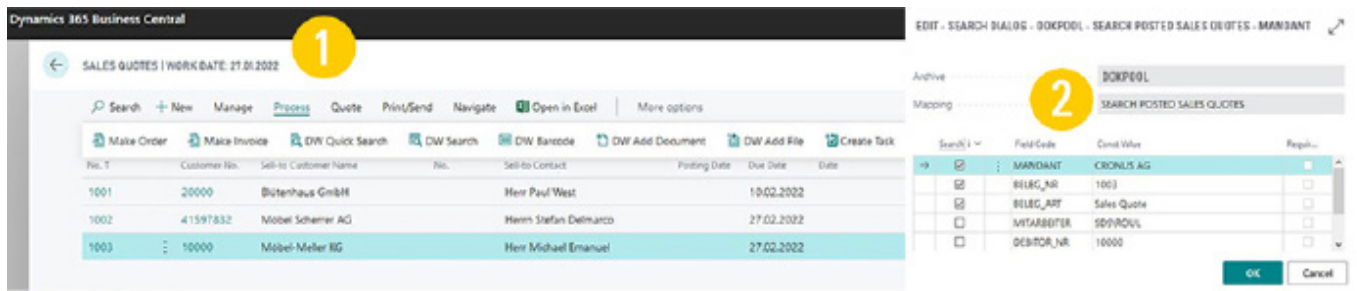
Advantages

- Automatic archiving of all documents
- Direct document query and display in the familiar environment
- Defined marking of paid invoices in the archive
- Complete traceability of the process history
- Guaranteed fulfilment of the storage obligations
- Convenient linking of documents and e-mails

Further information:
www.steigauf.de

Get an insight into the solution:

Business Central mask of a sales order (1), DocuWare search mask in Business Central (2), the entire order process in DocuWare (3)



1 Dynamics 365 Business Central - SALES QUOTES | WORK DATE: 27.01.2022

No. T	Customer No.	Sell-to Customer Name	No.	Sell-to Contact	Posting Date	Due Date	Date
1001	20000	Blütenhaus GmbH		Herr Paul West	19.02.2022		
1002	41597832	Möbel Schermer AG		Herrn Stefan Delmarco	27.02.2022		
1003	10000	Möbel-Meller KG		Herr Michael Emanuel	27.02.2022		

2 EDIT - SEARCH DIALOG - DOKPOOL - SEARCH POSTED SALES QUOTES - MANDANT

Archive: DOKPOOL
 Mapping: SEARCH POSTED SALES QUOTES

Search	Field Code	Cont Value	Regi...
<input checked="" type="checkbox"/>	MANDANT	CRONIS AG	<input type="checkbox"/>
<input checked="" type="checkbox"/>	BELEG_Nr	1003	<input type="checkbox"/>
<input checked="" type="checkbox"/>	BELEG_ART	Sales Quote	<input type="checkbox"/>
<input type="checkbox"/>	VSTABEITER	SD/ROH	<input type="checkbox"/>
<input type="checkbox"/>	DEBTR_Nr	10000	<input type="checkbox"/>

3 DocuWare

Briefkürbe Suchen Listen Aufgaben

DokPool - Standard-Suche

< Suche ändern

Typ	Firma	Kontakt	KD-/LF-Nr	Beleg-Nr	ext. Beleg-Nr	Beleg-Dat...
	Möbel-Meller KG	Herr Michael Emanuel	10000	1003		20.07.2020
	Möbel-Meller KG	Herr Michael Emanuel	10000	1003		16.07.2020
	Möbel-Meller KG	Herr Michael Emanuel	10000	1003		12.07.2020
	Möbel-Meller KG	Herr Michael Emanuel	10000	1003		08.07.2020
	Möbel-Meller KG	Herr Michael Emanuel	10000	1003		02.07.2020