



DMS | DOCUMENT MANAGEMENT SYSTEM

Fast digital archiving of documents - seamlessly integrated into your business solution

WORKING IN A RESOURCE-SAVING MANNER - WITH MORE TIME AND LESS PAPER

E-mails, inquiries, offers, invoices - every day you have to deal with a multitude of documents.

The Microsoft Dynamics 365 Business Central Extension DMS is your tool for digitally archiving these documents.

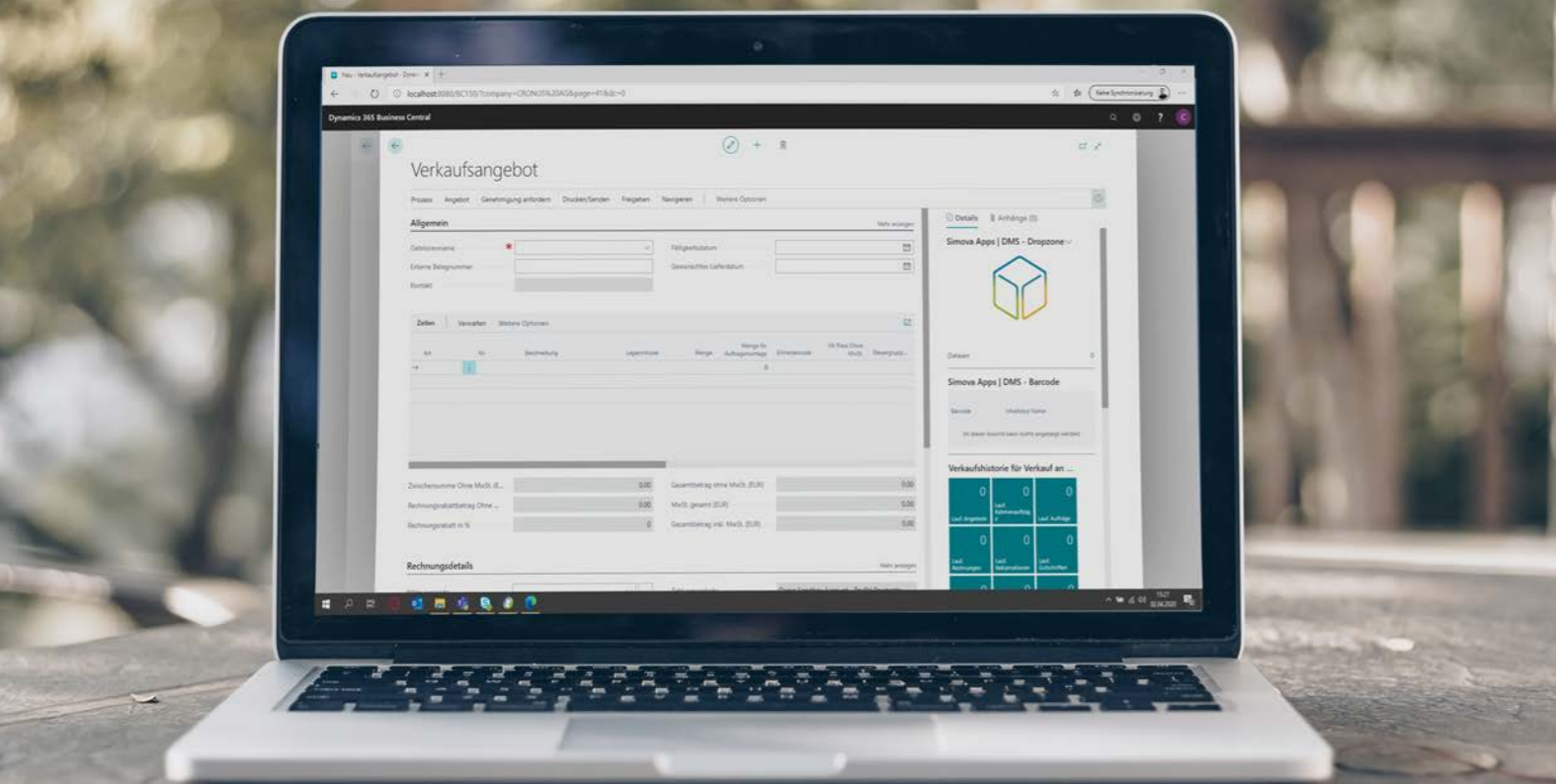
Unlike many other digital archiving solutions, DMS is seamlessly integrated with your Business Central application. So you have all your data in one place and don't need any additional, external solutions.

Via Drag & Drop, files can quickly and easily be stored for example in the purchasing, sales or delivery area, and can then be viewed at any point in the process.

A detailed search function also makes it easier to find information quickly when dealing with large amounts of data.

Around 10 litres of water are used to produce a sheet of paper.

An average office employee uses 833 sheets of paper in one month.



YOU CHOOSE YOUR FORM OF DATA FILING

For the direct connection to Microsoft SharePoint, which we use as document storage, you can choose between two implementation options according to your requirements and needs:

ON-PREMISE

With the on-premise solution, DMS is implemented directly into your IT infrastructure. In this way you can adapt existing Microsoft SharePoint installations and thus generate synergies with existing solutions. Alternatively it is also possible to store data in your local database. Whether virtual or physical server systems, implementing the on-premise DMS solution is simple and flexible. Due to a high scalability, small to very large solutions can be mapped.

O365

DMS from Simova connects your Business Central with the cloud solution Microsoft SharePoint Online or a SharePoint in Microsoft O365. Moving to a modern cloud solution allows you to access your data from any location and adapt your DMS to your specific requirements and resources at any time.

Please note that DMS for Microsoft O365 is currently not an audit-proof solution.

SYSTEM REQUIREMENTS

DMS for Microsoft Dynamics 365 Business Central you can, like many other extensions, also use it as a Get extension on Microsoft AppSource.

The extension can be integrated into your Business Central application with just a few clicks.





ADVANTAGES FOR EMPLOYEES

Are you the type of person who stores the majority of documents on your desktop's local hard drive? In the worst case, you can print all your documents and store them in your desk trays. No problem do you think?

For a while this may work out fine, but who doesn't know



- Smooth processes even during vacation or illness thanks to central management of information
- Familiar user interface
- Edit Office documents directly from Microsoft for Business Central.
- Increased transparency and traceability through versioning

that desktop and desk trays turn into a chaos of documents in no time at all?

With our DMS this is a thing of the past. Since all required documents are managed centrally, so that you can access the most important information at any time quickly and without a long search.

Furthermore, through the direct connection to Microsoft SharePoint, Office documents (Word, Excel, PowerPoint, e-mails) can be directly imported from Microsoft for business use. Central, saved as a new version and provided with corresponding comments. This means that it is always possible to trace who is doing what and when which document changed and why.

ADVANTAGES FOR MANAGEMENT

In the management you are confronted daily with the challenge to secure the competitiveness of your company and to make appropriate decisions. A document management system helps you to do this.

With our DMS, your documents are digitally managed and



- Fast return on investment through rapid implementation and low time expenditure
- Low training effort and high user acceptance
- Future-proof investment
- Individually adaptable and expandable (e.g. to an audit-proof solution)

centrally stored. The tedious search for information will be a thing of the past in the future thanks to structured, transaction-based filing.

With DMS, your employees can work with their accustomed User interface, so that the training effort is reduced to a minimum and a high user acceptance as well as a successful introduction of the DMS are achieved.

can be guaranteed. In addition, the DMS is characterized by a flexible architecture and can be individually adapted according to the requirements and can be extended to include various Extend modules, e.g. to a revision-safe Archive system. You save money for expensive premises and folders. Our solution offers easy document access as well as time and space savings.





ADVANTAGES FOR PURCHASE AND SALE

Supplier declarations, quotations, orders, purchase orders, invoices - in purchasing and sales you receive a large number of documents every day. Maintaining an overview can quickly become a mammoth task.

With a DMS, all documents are in line with the corresponding projects, creditors, debtors, etc. in such a way



- Structured assignment of documents to projects, accounts payable and accounts receivable makes it easier to find information
- History of documents remains traceable thanks to versioning
- Automatic return of documents by means of barcode scenarios

that you can find the documents in seconds and trace the correspondence at any time.

To further optimize your workflows, our DMS offers you a number of additional features, such as versioning or integration of barcode processes. The history of documents is retained so that changes to contracts or quotations can be traced at any time. The integration of barcode processes enables you to return non-digital documents to the system.

Think, for example, of delivery notes or order confirmations that you want to automatically store in Business Central after they have been signed or handwritten. This is possible via a barcode on the respective document, a document scanner or a multifunctional device.

ADVANTAGES FOR THE FINANCE DEPARTMENT

As a financial accountant, you always have an overview of all payment-based transactions in your company, ensure proper and complete documentation and are responsible for invoice verification. Without digital document management, this task can quickly become a pain in the face of the large number of invoices.



- Digital management and archiving of all Transaction-related documents and records
- Fast and convenient search for documents using metadata
- Possibility of extending incoming invoice processing to an audit-proof solution

The DMS from Simova supports you with digital Management and archiving of documents of all kinds. Documents generated by the system such as quotations, orders, Orders and invoices are automatically archived when they are booked or when they are printed out and are archived with Metadata (keywords) added for quick search.

External documents (e.g. order confirmations) can be conveniently and quickly transferred to the archive via Drag & Drop and can also be searched with metadata. must be provided. This means that all documents archived for a transaction are available for display at all points in the process. Always at hand - without tedious searching.

Thanks to its flexible architecture, our DMS can easily be expanded with additional modules.



FEATURES AT A GLANCE

Drag & Drop

Easy filing of all kinds of documents via drag & drop. During filing, the document type is defined and metadata is adjusted if necessary.

Quickdrop

Regular document types, such as photos or e-mails, can be stored more quickly using the Quick Stores function. A selection of a Document type is not necessary.

Individual definition of metadata

Metadata is the relevant information given to each document when it is stored in Microsoft Dynamics 365. These can be defined individually and supplemented by a free text.

Preview function

If, for example, you are in an offer or order, you can view the associated documents and all other process-related documents directly.

Double printing

Double printing enables documents (e.g. quotations, invoices) to be stored automatically when they are printed or sent via e-mail from Microsoft Dynamics 365.

Transparent archiving

Documents are automatically stored in the course of business processes. For example, documents stored on a quotation are included in the process and are also available on the order during conversion.

Document basket function

In the document overview, stored documents can be added to a document basket and saved as a zip package or sent directly by e-mail.

Versioning

If documents are stored several times, a new version is created, which can then be called up in the document overview. The history of a document thus remains traceable.

Barcode processes

If documents are to be stored again in Microsoft Dynamics 365 after they have been signed or edited by hand, this is automatically possible via a barcode.

Setup of inbound lists

Incoming lists can be filled e.g. by e-mail or folders on the file server. From there, you can access the Possibility to assign documents to an order.

Sort and filter function

In the document overview of the Simova DMS, documents can be sorted according to criteria such as year, document type, version or user. You can search in the individual columns using direct input and set filter options.

