

yaveon



Yaveon 365 DMS Connect

Documents in Control:
DMS in Business Central

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Microsoft
Partner

Everything at a Glance.

Product

- Product: ESCM
- Basis: Microsoft Dynamics 365 Business Central
- Company size: Small and medium-sized companies
- Integration module: Available for Yaveon 365 and Continia Document Capture
- Industries: For all industries

The Four Most Important Advantages:

- Revision-proof archiving: No more shelves filled with bulging folders containing printed documents. Archive all company documents easily and remain audit-proof. And what about legal requirements for archiving documents? Of course, you comply with these.
- Fully integrated DMS processing directly in Microsoft Dynamics 365 Business Central/ NAV: The app integrates natively into your business logic and augments it in a configurable way. Enabling you to archive both internal and adapted documents flexibly as required, and of course, extend the metadata accordingly.
- Work swiftly and efficiently: Complete your regular tasks, such as creating quotations and receiving and sending orders faster and more efficiently, as the process-related document view provides access to all the necessary documents directly.
- High degree of automation: Depending on the document type, archiving is carried out fully automatically in the background or directly during document printing. Metadata is added before the document is transferred to the archives.

Yaveon 365 DMS is specially designed for use with the DMS systems of d.velop AG and Microsoft SharePoint.

- [d.velop documents](#) – the SaaS solution. Here's how it works: Simply register and start.
- [d.velop d3.ecm](#) – the classic DMS solution for in-house installation.
- [SharePoint Online / On-Prem](#) – for a cost-effective introduction to DMS.

Yaveon 365 DMS – these are the advantages offered by the intuitive user interface:

- The DropZone for accessible and flexible storage of documents
- A document list with an overview of all documents relevant to the process
- A configuration and administration environment enhanced with wizards and templates.

How Does This Work Exactly?

The Features.

Reduce Your Workload – Safely

Depending on the document type, archiving is carried out fully automatically in the background or directly during document printing. Metadata is added to your documents, before they are transferred to the archive. You can easily store additional documents via the DropZone and assign them to processes in Microsoft Dynamics 365 Business Central. This saves time and increases the security of your processes. The solution really comes into its own when users start working on regular tasks such as the processing of quotations, purchase orders, and sales orders. They can then directly access all the necessary documents via the process-related document provision. No more searching or asking multiple colleagues. With the system, you can look forward to significantly increased efficiency and fewer errors.

Open DMS Documents With Just One Click

You can open your documents in Microsoft Dynamics 365 Business Central with just one click, for example, as a preview, depending on the context. This ensures you have immediate access to the documents you need to deal with all processes efficiently. And of course, should documents be missing, you can add them easily via drag and drop.

Getting Started

The solution can be deployed quickly, due to the extensive setup templates for the interface, and the customized setup packages for the d.velop DMS systems or SharePoint. There is no complicated installation.

One Solution, Many Possibilities

Do you want to configure the system? No problem. Once you have activated the setup templates, you soon want the system to do more - and this is where you discover the strength of the solution. Just choose which documents you want to archive - these can be internal documents too, of course. In addition, you can utilize the deeply configurable metadata generation and link logic for Microsoft Dynamics 365 Business Central documents with DMS document types. Can this be true? Yes - and it also includes, for example, line information or sublines such as lots. These could include article numbers, lot or project numbers of the posted deliveries, which can also contain a wide variety of values per document. Of course, you can also use the same depth when configuring the search assignment of DMS data to Microsoft Dynamics 365 Business Central masks. With this, you can keep a close eye on the entire document chain - from the posted invoice to the affected blanket orders - through several stages.

Dynamics 365 Business Central

Sales Order | Work Date: 1/26/2023

1004 · Möbel-Meller KG - test

Process Release Posting Prepare Order Request Approval Print/Send Navigate More options

General Show more

Customer Name: Möbel-Meller KG - test Due Date: 2/26/2023

Contact: Herr Michael Emanuel Requested Delivery Date:

Posting Date: 1/26/2023 External Document No.:

Order Date: 1/26/2023 Status: Released

Lines Manage More options

Type	No.	Item Reference No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Re
Item	1000		Trekking bike	BLAU	5		
Item	1000		Trekking bike	BLAU	5		

Subtotal Excl. VAT (EUR): 29,000.00 Total Excl. VAT (EUR): 29,000.00

Inv. Discount Amount Excl. VAT: 0.00 Total VAT (EUR): 5,510.00

Invoice Discount %: 0 Total Incl. VAT (EUR): 34,510.00

Details Attachments (1)

Profit %: 91.23513

Unit Price: 4,000.00

Document View

Name Type

Sales Correspondence (2)

Phone call note Auftrag_1004

Splitting of Delivery_Auftrag_10...

Sales Order (3)

SalesOrder_1004

Drop Zone



Details: JC00000686

JC00000686

VIEW PROPERTIES NOTES (0) VERSIONS (1) ACTIVITIES

Use browser preview

1 of 1 110%

Order Confirmation 1004

January 26, 2023

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Möbel-Meller KG - test

Herr Michael Emanuel

Tischlerstr. 4-10

48436 Düsseldorf

CRONUS, Düsseldorf

Bastian Bruhns

Morgensternweg 14

48436 Düsseldorf

Deutschland

External Document No. Salesperson: Detlef Hembrock Quote No. Shipment Method: Ab Warenhaus

No.	Description	Quantity	Unit Price Excl. VAT	VAT %	Line Amount Excl. VAT
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← Geb. Verkaufsrechnung | Arbeitsdatum: 26.01.2023

103033 · Möbel-Meller KG - test

Prozess Rechnung Korrigieren Drucken/Senden Navigieren Aktionen

Allgemein

Nr. 103033 Buchu...

Debitor Möbel-Meller KG - test Fälligk...

Kontakt ... Anget...

Zeilen Verwalten Weitere Optionen

Art	Nr.	Artikelrefer... Nr.	Beschreibung
→ Bemerkung			kt1
Bemerkung			KT2
Bemerkung			KT3
Bemerkung			KT4
Bemerkung			KT5
Artikel	1000		Tourenrad
Artikel	1001		Rennrad
Artikel	1100		Vorderrad
Artikel	1110		Peige
Artikel	1120		Speichen
Artikel	1150		Nabe vorn

Rechnungsbetrag-Setrag Ohne M... 0,00 MwSt...

← Prof-SCM 365 Kom. Buchblatt Aktivitätszellen | Arbeitsdatum: 26.01.2023

Suchen Aktivität anzeigen Datei anzeigen Nachricht Zeige Datendetails

AKT...	Status	Aktivität Typ	Nr.	Ref... Name	Part... Beleg Nr.	Partner Code	Kom... AdS... Status Blob	Kom... Status Blob	Com Adapter Exchange
112		Buchen Buc...	103033	Möbe...	0113...	AMAZON			Ausgeführt Executed - Finished (gr)

Dynamics 365 Business Central

← Prof-SCM 365 DMS Message Setup | Work Date: 1/26/2023

Search Edit List Delete Create DMS message type Edit DMS message type Create from template Server Setup (Com-Adapter)

Type	No.	Act...	Pre... Stat...	No. of Error Lines	Last Activity date	Action Type	Source Type	Content Type	Journal Batch Name	Message Type Code	Partner Code	DMS Check Blob	DMS O...
Page	21			0	1/26/2023	DMS (DropZone)	Customer	Questionnaire	STD	DMS_DS_DS_SAL_CUS	DMS_DVELOP	✓	Ve
Page	21			0	1/26/2023	DMS (DropZone)	Customer	Correspondence	STD	DMS_DS_DS_SAL_CUS	DMS_DVELOP	✓	Ve
Page	21			0	1/26/2023	DMS (DropZone)	Customer	Agreement	STD	DMS_DS_DS_SAL_CUS	DMS_DVELOP	✓	Ve
Page	21			0	1/26/2023	DMS (DropZone)	Customer	Contract	STD	DMS_DS_DS_SAL_CUS	DMS_DVELOP	✓	Ve
Page	21			0	1/26/2023	DMS (DropZone)	Customer	Customs Docu...	STD	DMS_DS_DS_SAL_CUS	DMS_DVELOP	✓	Ve
Page	26			0	1/26/2023	DMS (DropZone)	Vendor	Explanation	STD	DMS_DS_DS_PUR_VND	DMS_DVELOP	✓	Eir
Page	26			0	1/26/2023	DMS (DropZone)	Vendor	Correspondence	STD	DMS_DS_DS_PUR_VND	DMS_DVELOP	✓	Eir
Page	26			0	1/26/2023	DMS (DropZone)	Vendor	Price information	STD	DMS_DS_DS_PUR_VND	DMS_DVELOP	✓	Eir
Page	26			0	1/26/2023	DMS (DropZone)	Vendor	Technical Infor...	STD	DMS_DS_DS_PUR_VND	DMS_DVELOP	✓	Eir
Page	26			0	1/26/2023	DMS (DropZone)	Vendor	Agreement	STD	DMS_DS_DS_PUR_VND	DMS_DVELOP	✓	Eir
Page	26			0	1/26/2023	DMS (DropZone)	Vendor	Contract	STD	DMS_DS_DS_PUR_VND	DMS_DVELOP	✓	Eir
Page	26			0	1/26/2023	DMS (DropZone)	Vendor	Approval	STD	DMS_DS_DS_PUR_VND	DMS_DVELOP	✓	Eir
Page	30			0	1/26/2023	DMS (DropZone)	Item	Manual	STD	DMS_DS_DS_MDM_ITM	DMS_DVELOP	✓	Pri
Page	30			0	1/26/2023	DMS (DropZone)	Item	Operating Instr...	STD	DMS_DS_DS_MDM_ITM	DMS_DVELOP	✓	Pri
Page	30			0	1/26/2023	DMS (DropZone)	Item	Specification	STD	DMS_DS_DS_MDM_ITM	DMS_DVELOP	✓	Pri
Page	30			0	1/26/2023	DMS (DropZone)	Item	Technical Infor...	STD	DMS_DS_DS_MDM_ITM	DMS_DVELOP	✓	Pri
Page	30			0	1/26/2023	DMS (DropZone)	Item	Certificate	STD	DMS_DS_DS_MDM_ITM	DMS_DVELOP	✓	Pri
Page	41			0	1/26/2023	DMS (DropZone)	Quote	Cover Letter	STD	DMS_DS_DS_SAL_HEA	DMS_DVELOP	✓	Ve
Page	41			0	1/26/2023	DMS (DropZone)	Quote	Calculation	STD	DMS_DS_DS_SAL_HEA	DMS_DVELOP	✓	Ve
Page	41			0	1/26/2023	DMS (DropZone)	Quote	Correspondence	STD	DMS_DS_DS_SAL_HEA	DMS_DVELOP	✓	Ve
Page	42			0	1/26/2023	DMS (DropZone)	Order	Quote	STD	DMS_DS_DS_SAL_HEA	DMS_DVELOP	✓	Ve
Page	42			0	1/26/2023	DMS (DropZone)	Order	Correspondence	STD	DMS_DS_DS_SAL_HEA	DMS_DVELOP	✓	Ve



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