

**Simple. Flexible. Efficient.**

# **DMS and ECM Interface**



## **The one interface for your DMS system**

Our DMS and ECM Interface App connects your ERP system Microsoft Dynamics 365 Business Central quickly and easily with your document management system: Choose between Saperion ECM, SharePoint Online or ELO Digital Office. We provide you with a tool that you can configure yourself according to your individual processes.

Simple.



Setup with wizard or design according to your own ideas

### App Setup

Select your document management system from the drop-down list and configure the app in a few steps using the setup wizard to get started quickly. Currently, connectivity to SharePoint Online, Saperion, and ELO systems is available. Alternatively and in addition to the guided setup, you can see the various configuration options on the right, which allow you to set up your DMS connection in all conceivable ways. Below you will find the definition of the archiving structure, tagging or automatic archiving as well as search definitions. There are no limits to what you can do.

Do you need help with the setup?

Help Docs

### DMS and ECM Interface App Setup Wizard

Document Storage Setup

Setups Assisted Setup | Actions ▾ Related ▾ Automate ▾ Fewer options

**General**

Storage Type ..... SharePoint online ▾  
Host Name ..... ELO Digital Office  
Language Code ..... DEU ▾

Authorization Type ..... OAuth 2.0 - Client Credentials ▾  
Authorization Type fo... ..... OAuth 2.0 - Client Credentials ▾

**OAuth 2.0 Client Credentials Settings >**

**Show Files**

Always show files by S...

**Setup Options**

- Setups Assisted Setup | More options
- Document Drives Automatic Report Archiving Search Definitions Selection Lists
- Archiving Tags Storage Definitions Display Definitions User Settings

Setup Options

Simple.



Drag & Drop archiving for an intuitive way of working

### Drag & Drop Archiving

Documents can be uploaded simply by dragging and dropping within the upper, dashed area of the factbox. The tagging / adding metadata for the document is done according to the default settings and can be added automatically for each field or manually. If master data such as the customer name change, this information is automatically adopted for all documents concerned. Within the factbox, all documents linked to this entry are listed in a dynamic folder structure. Clicking on the three dots opens the various management functions for the selected document.

The screenshot shows a 'Customer Card' for '10000 · Adatum Corporation'. The 'General' section includes fields for No. (10000), Name (Adatum Corporation), Balance (LCY) (2,854.81), and Balance Due (LCY) (-1,196.90). The 'Address & Contact' section includes Address (Station Road, 21), City (Düsseldorf), and Contact Name (Jakob Otto). A 'Documents' section is visible on the right, with a dashed box highlighting the 'Drop files here or browse files' area. A context menu is open over the 'Documents' list, showing actions like 'Download File', 'Open File', 'Open Folder', 'Edit manual Tags for file', 'Delete Line', and 'Select More'.

Factbox with drag & drop and other actions for document management

Flexible.



Quickly find documents with multiple search options

### Document Search

With a large number of documents, it is easy to lose track of them all. This makes a well-designed search function all the more crucial. You have a wide range of options for searching your documents. For example, you can choose between a simple text search or a search definition that you have previously defined yourself. Beyond that, you can filter using search texts within metadata. This way you are guaranteed to quickly find the document you need. Here you also have the option to adapt the search to your individual processes and preferences or stick to the standard.

The screenshot shows a 'Search Documents' interface. At the top, there is a search bar with a magnifying glass icon and the word 'Search'. Below this is an 'Options' section. The 'Search Mode' dropdown is set to 'Related to Record' and is open, showing options: 'Related to Record', 'Search Text', 'Search Definition', and 'Tags'. The 'Table' dropdown is set to 'Customer' and is also open, showing a search result: 'Related to Record' with the value 'Customer: 10000'. Below the options is a toolbar with buttons: 'Files', 'Download File', 'Open File', 'Open Folder', and 'Delete Line'. The main area displays a list of search results with expandable sections: 'File Name', 'PostedCreditMemos [1]', 'PostedInvoices [3]', and '103215 [1]'.

Document search with multiple search criteria

# Flexible.



## Upload photos with mobile devices and extensive preview features

### Preview Feature

Click the document to open the high-quality preview. Use the 'Open Page in New Window feature' to keep the document open and view it on a second screen while you continue working in Dynamics 365 Business Central. This also allows you to place several documents next to each other and compare them. That saves you from downloading the documents beforehand and allows you to work quickly within Business Central. Editing the document within the preview using the browser functions is only temporary. No changes are made to your documents. However, you may still need them for visual support.

**Customer Card**  
30000 · School of Fine Art

Home Request Approval New Document Price

Contact Apply Template Merge W

**General**

No. 30000  
Name School of F  
Balance (LCY)  
Balance (LCY) As Vendor  
Balance Due (LCY)

**Address & Contact**

Address Lange Str. 1  
Address 2  
Country/Region Code US  
City Miami  
Bundesland FL  
Post Code FL 37125

Show on Map

**Sales - Shipment**

School of Fine Art  
Meagan Bond  
Lange Str. 10-15  
Miami, FL FL 37125  
USA

Sell-to Customer No. 30000  
Document Date 01/20/22  
Shipment No. 102003  
Shipment Date 10/02/23  
Purchase Order No.  
Our Document No.

Phone No. 999 / 9 99 99 99  
Home Page  
Email  
VAT Reg. No. 777777777  
Giro No. 888-9999  
Bank Weltweit Bank  
Account No. 99-99-888  
Salesperson Detlef Hembrock

No.	Description	Quantity	Unit of Measure
1988-S	SEOUL Guest Chair, red	1	Piece

30000\_102003.pdf

102009 [1]  
30000\_102009.pdf

102012 [1]  
30000\_102012.pdf

102014 [1]  
30000\_102014.pdf

Customer Picture

Preview of a Document

Efficient.



All-round carefree with automatic archiving of posted receipts

### Automatic Archiving

The automatic archiving of posted documents can be flexibly set up and managed. Defining storage rules and the composition of filenames, you create the basis for legally compliant, audit-proof archiving. You not only save resources and costs, but can also be sure that the documents are stored where they should be.

Report ID ↑	Report Caption	Storage Definition Code	Subdirectory Entry No.	Subdirectory Description	File Name	Placeholders	Auto... archive on Docu...	Archi... PDF files	Archi... Word files	Archi... Excel files
→ 208	Sales - Shipment	POST.S. SHIPMENT			%1_%3	%1=Sell-to Customer No., %2=Unpo...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1306	Sales - Invoice	POST.S. INVOICE			%1_%3	%1=Sell-to Customer No., %2=Unpo...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1307	Sales - Credit Memo	POST.S. CREDIT ...			%1_%3	%1=Sell-to Customer No., %2=Unpo...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

  

	Auto... archive on Docu...	Archi... PDF files	Archi... Word files	Archi... Excel files
%2=Unpo...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
%2=Unpo...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2=Unpo...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Automatic Report Archiving (at document posting)

**There is a 30-day free trial for our app.**

You do not sign up for a subscription.

**Free Trial**

**Help Docs**

**Contact**

